Oracle® Retail Xstore Point-of-Service, Lane Checkout User Interface

User Guide

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Contents

Send Us Your Comments xi

Preface xiii

Audience xiii
Documentation Accessibility xiii
Related Documents xiii
Customer Support xiv
Review Patch Documentation xiv
Improved Process for Oracle Retail Documentation Corrections xiv
Oracle Retail Documentation on the Oracle Technology Network xv
Conventions xv

1 Purpose and Screen Conventions

Getting Started 1-1
Starting the Application 1-1
Logging In 1-1
Logging Out 1-2
Changing your Password 1-2
Screen Layout Register 1-2
Splash Screen 1-2
Operator Display 1-2
About Screen 1-5
Virtual Keyboard 1-5
Customer Display 1-7
Code Functions 1-8
Privileges 1-9
Override 1-9

2 Prompts

Selection Required Prompt 2-1
System and Error Information Prompt 2-2
Response Required Prompt 2-2
Item Prompts 2-2
Entry Required Prompt 2-2
Selection Required Prompt 2-3

Information Prompt 2-3
Transaction Prompts 2-4
Pre-Sale 2-4
Pre-Tender 2-4
Post-Tender 2-4

3 Basic Transaction Entry

Basic Transactions 3-1
Enter Items Manually 3-2
Department Lookup 3-3
Quick Pick 3-4
Scan Barcode 3-4
Barcodes with Properties 3-5
Weight in Barcode 3-5
Quantity in Barcode 3-5
Price in Barcode 3-5
Press Barcode with Age Verification 3-6
Manual GS1 Entry 3-6
Attached Items 3-7

4 Weighted Items

Minimum and Maximum Weight 4-1
Enter Weighted Items 4-1

5 Processing Tenders

Cash 5-2
Coupon 5-3
Traveler's Check 5-4
Foreign Currency 5-4
Debit Card/Credit Card 5-4
Debit Card Manual Authorization 5-5
Debit/Credit Card Authorization Fails 5-6
House Account 5-6
Exceed Credit Limit House Account 5-7
Splitting Tenders 5-7
Voiding a Tender Type 5-9
House Account Payment 5-10
House Account Reversal 5-10
No Sale 5-10
E-Mail Receipt 5-11
E-Mail Receipt - Customer Request 5-11
General E-Mail Receipt 5-12
Updating a Customer's E-Mail Address 5-12
Selecting a Printer 5-13
Sales Tax 5-13
Pre-Flight Check 5-13

Transaction Completed 5-13

6 Modifying a Sales Transaction

Repeating the Last Item 6-1
Voiding Items 6-1
Voiding the Last Item 6-1
Voiding a Line 6-3
Swipe 6-3
Void Line Button 6-5
Changing the Quantity of an Item 6-6
Changing the Quantity While Entering the Item 6-6
Changing the Quantity after Entering the Item 6-6
Changing the Price of an Item 6-7
Changing the Price Before Entering the Item 6-7
Changing the Price after Entering the Item 6-7
Cancelling a Transaction 6-8
Suspending/Resuming a Transaction 6-8
Suspending a Transaction 6-9
Resuming a Transaction 6-9
Resuming a Transaction with Barcode 6-9
Resuming a Transaction without Barcode 6-9
Adding Non-Merchandise Items to the Sale 6-9
Adding Gift Cards to the Sale 6-12
Adding Gift Certificates to the Sale 6-13

7 Discounts and Deals

Adding a Discount to an Item 7-1
Adding a Transaction Discount 7-4
Adding an Award Discount 7-5
Voiding a Discount 7-8
Deals 7-8
Total Savings 7-10

8 Miscellaneous Functions

Age Verification 8-1
Cashier Age Restrictions 8-2
Time Restrictions 8-3
Price Inquiry 8-4
Sales Ban 8-4
Recalling an Item 8-5
Purchase Limit 8-5
Maximum Purchase Limit 8-5
Minimum Purchase Limit 8-5
Quantity Query 8-6
Price Query 8-6
Verifying a Price Tag 8-6

Serial Number 8-6
Post Void Transaction 8-7
Reprinting the Last Receipt 8-7
Reprinting a Receipt 8-8
Store Message 8-8
Training Mode 8-9
Entering the Training Mode 8-9
Exiting the Training Mode 8-9
Opening the Browser 8-9
Locking the Register 8-9
Prompting for a Price 8-10
Restricting Receipts 8-10
Inventory Adjustment 8-11
Clock In/Clock Out 8-11
Closing the Application 8-13

9 Return Transactions

Returning Items without Original Receipt - Unverified Return 9-1
Returning Items with Original Receipt - Verified Return 9-4
Performing an Exchange 9-5
Returning Non-Merchandise Items 9-6
Returning a Gift Card 9-9
Returning a Gift Certificate 9-11

10 Customer Search

Linking a Customer to a Transaction 10-1
Scanning Customer Loyalty Card 10-1
Searching for a Customer 10-1
Changing the Language of the Customer Display 10-4
Removing a Customer from the Transaction 10-4
Loyalty Inquiry 10-4

11 Item Search

Searching for an Item 11-1

12 Managing Till Options

Till Management 12-1
Till Accountability - Automatic Register Open at Login 12-1
Register Accountability - Automatic Register Open at Login 12-2
Configurations Automatic Register Open 12-3
Register Accountability 12-3
Cash Level Warning 12-3
Paid In/Paid Out Transaction 12-4
Paid Out Transaction 12-4
Paid In Transaction 12-5
Cash Transfer 12-5

Entering a Safe Bag ID 12-6
Cash Pickup 12-6
Entering a Safe Bag ID 12-7
Till Audit 12-8
Non-Blind Till Audit 12-8
Blind Till Audit 12-12
Applying Real Time Updates 12-16
Closing the Register 12-18
Till Accountability 12-18
Register Accountability 12-18

13 24/7 Hour Store Environment

Warning Messages 13-1
End of Retail Session Process 13-2
Pre-defined Float 13-3
Pre-defined Float - Closing the Register 13-3
Pre-defined Float - Opening the Register 13-3
Remaining Balance is New Float 13-5
Balance is New Float - Closing the Register 13-5
Balance is New Float - Opening the Register 13-6
Float Balance 13-7
Float Balance - Closing the Register 13-7
Float Balance - Opening the Register 13-8
Prompt for Float 13-9

Glossary

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Oracle Retail Xstore Point-of-Service, Lane Checkout User Interface/User Guide, Release 16.0.0.1

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Preface

This *Oracle Retail Xstore Point-of-Service, Lane Checkout User Interface User Guide* describes all available functions of the Oracle Retail Xstore Point-of-Service, Lane Checkout User Interface of 16.0.0.1.

Audience

This User Guide is for users and administrators of the Oracle Retail Xstore Point-of-Service, Lane Checkout User Interface. This includes merchandisers, buyers, business analysts, and administrative personnel.

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Related Documents

For more information, see the following documents in the Oracle Retail Xstore Suite 16.0.0.1 documentation set:

- *Oracle Retail Xstore Suite Release Notes*
- *Oracle Retail Xstore Point-of-Service User Guide*
- *Oracle Retail Xstore Point-of-Service Mobile User Guide*
- *Oracle Retail Xstore Point-of-Service Reports Guide*
- *Oracle Retail Xstore Point-of-Service Manager's Guide*
- *Oracle Retail Xstore Point-of-Service Shipping, Receiving, and Inventory Guide*
- *Oracle Retail Xstore Suite Implementation and Security Guide*
- *Oracle Retail Xstore Suite Deal Pricing Guide*

- *Oracle Retail Xenvironment User Guide*

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When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 16.0) or a later patch release (for example, 16.0.1). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

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Oracle Retail Documentation on the Oracle Technology Network

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Purpose and Screen Conventions

The purpose of this user guide is to provide complete documentation of the available functions of the Xstore Point-of-Service, Lane Checkout User Interface. This chapter describes how to start and log in and out of the application, and describes the operator and customer screen layout, as well as code functions and privileges.

Getting Started

This section provides instructions on starting and logging in and out of the Xstore Point-of-Service, Lane Checkout User Interface, as well as how to change the current user password.

Starting the Application

Navigate: XFG-Client > the Xstore Point-of-Service, Lane Checkout User Interface appears.

Logging In

Use the following steps to log in to the Xstore Point-of-Service, Lane Checkout User Interface.

1. At the Register Login screen, you are prompted for your user identification. Enter your user name and press **Enter**.

   Note: The initial login requires a password change, see Changing your Password.

2. You are prompted for your password. Enter your password and press **Enter**.

   Note: For security purposes, your password displays as a row of asterisks.

3. You can now start a sales transaction.

Note: The initial login for the business day prompts the user to complete Till Management tasks, for example, assign a till and carry out a Cash Transfer. For more information about Till Management tasks, see Chapter 12, "Managing Till Options." If your system uses Till Accountability, the receipt Attach Till is printed.

Logging Out

Use the following steps to log out.

1. To log out, press the **Logout** menu button.
2. You are logged out.

Note: If your system uses Till Accountability (see the "Till Management" section in Chapter 12) the receipt Remove Till is printed.

Changing your Password

To change your current password, follow the steps below.

1. Select the **Change Password** menu button.
2. You are prompted for your current user identification. Enter your current user name and press **Enter**.
3. Enter your current password and press **Enter**.
4. The system prompts for the new password. Enter your new password and press **Enter**.

Note: The system may enforce certain rules regarding passwords, such as the minimum number of characters required.

5. Confirm your new password and press **Enter**. Your password has been changed, and you are logged into the Xstore Point-of-Service, Lane Checkout User Interface.

Screen Layout Register

This section describes the Screen Layout of the Xstore Point-of-Service, Lane Checkout User Interface.

Splash Screen

If you have logged into the register the Splash Screen with the current version of the Xstore Point-of-Service, Lane Checkout User Interface is displayed. The Splash Screen is also displayed on the Customer Display when no item has been added to the Cart.

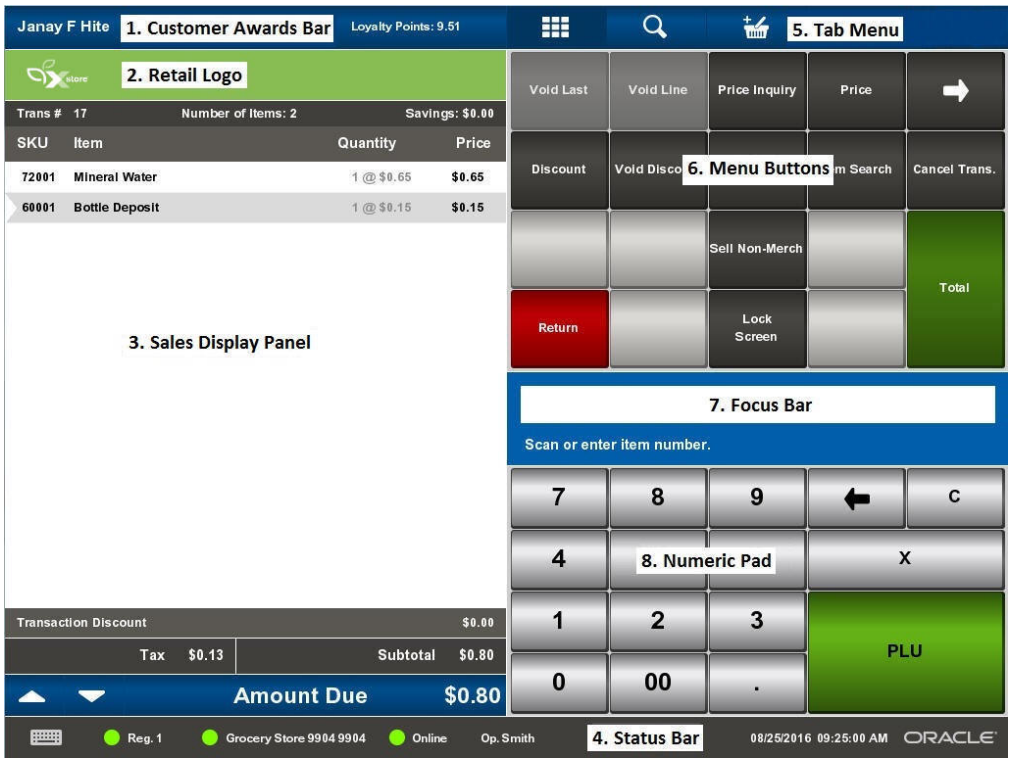
Operator Display

The Operator Display is divided into the following eight sections:

1. Customer Awards Bar
2. Retail Logo

3. Sales Display Panel
4. Status Bar
5. Tab Menu
6. Menu Buttons
7. Focus Bar
8. Numeric Pad

Figure 1–1 Operator Display - Screen Layout



1. **Customer Awards Bar**: If a customer is linked to the sales transaction, the Customer Awards Bar displays the customer name, awards balance and loyalty points. If no customer has been linked to the sales transaction the Customer Awards Bar stays blank.
2. **Retail Logo**: The display of the retailer logo is configurable. The Xstore Point-of-Service, Lane Checkout User Interface logo is displayed by default.
3. **Sales Display Panel**: The Sales Display Panel displays the sales transaction information for items, taxes, tenders or any other detailed data about the current sales transaction. Table 1–1 describes the available components of the Sales Display Panel.

Table 1–1 Sales Display Panel - Components and Navigation

Component	Description
Header	The header of the Sales Display Panel lists the receipt (or transaction) number, the number of all entered items and the total savings, discounts and deals (see Chapter 7, "Discounts and Deals") of the current transaction.

Table 1–1 (Cont.) Sales Display Panel - Components and Navigation

Component	Description
Column Headers	The column headers of the Sales Display Panel list the following entries: **SKU** - Stock Keeping Unit, Item Id assigned to an item by the retailer **Item** - item description **Quantity**- entered quantity, in format QTY @ Price or Price/Weight **Price** - extended item amount (actual price x quantity)
Transaction Discount	The total amount of manually applied Transaction Discounts are displayed in this field.
Subtotal	The field **Subtotal** shows the subtotal amount of the items, which are currently displayed on the Sales Display Panel.
Tax	If configured, the field **Tax** shows the current tax amount of all entered items shown on the Sales Display Panel.
Up- and Down-Arrows	Use the up and down arrows to select an item in the Sales Display Panel.
Amount Due	The field **Amount Due** shows the current amount due of the entered items shown on the Sales Display Panel. You can navigate to the Sales Tender screen with a touch on **Amount Due**.

4. **Status Bar**: The Status Bar is a screen component that displays the following sections containing store-related information. It is always visible on every Register screen. Table 1–2 describes the available components of the Status Bar.

Table 1–2 Status Bar - Components and Navigation

Component	Description
Keyboard icon	This icon prompts the alphanumeric keyboard.
Register status icon	This icon indicates the status of the register: ■ If the icon is green, the register is open and the user is logged in. ■ If the icon is yellow, the register is open but the user is logged out. ■ If the icon is red, the register is closed.
Register number	This field shows the register number.
Store status icon	This icon indicates the status of the store: ■ If the icon is green, the store is open. ■ If the icon is red, the store is closed.
Store name and number	This field shows the store name and number.
Database Service status icon	This icon indicates the status of the services used by the store: ■ If the icon is green, the Datasources are online. ■ If the icon is yellow, at least one WAN Datasource is offline. The system is using the local Datasource. ■ If the icon is red, at least one LAN Datasource is offline. The system is using the offline process set up for the store.

Table 1–2 (Cont.) Status Bar - Components and Navigation

Component	Description
Store operator	This field shows the operator currently signed into the Xstore Point-of-Service, Lane Checkout User Interface.
Date	This field displays the current register date.
Time	This field display the current register time.
Oracle icon	This icon navigates to the About screen. For more information about this screen, see the About Screen section.

5. **Tab Menu**: The Tab Menu can hold up to five Tab Menu features. The Tab Menu is configurable. The Xstore Point-of-Service, Lane Checkout User Interface offers the Tab Menu features listed in Table 1–3 by default.

Table 1–3 Tab Menu

Icon	Description
	Menu Button Tab Use the Menu Button Tab to return to the Sales Display Panel.
	Department Lookup Tab For more information about the Department Lookup, see the "Department Lookup"section in Chapter 3.
	Quick Pick Tab For more information about the Quick Pick option, see the"Quick Pick" section in Chapter 3.
	Store Messages Tab For more information about store messages, see the "Store Message" section in Chapter 8.

6. **Menu Buttons**: The Menu Buttons show the available functions. To switch to additional Menu Buttons, use the left right arrows.
7. **Focus Bar**: The Focus Bar provides a single-entry field, a data entry form in which only one entry for a specified piece of data may be captured and then stored in the database. The message area displays instructions for the current operation.
8. **Numeric Pad**: The Numeric Pad is a numeric keyboard for entering numbers.

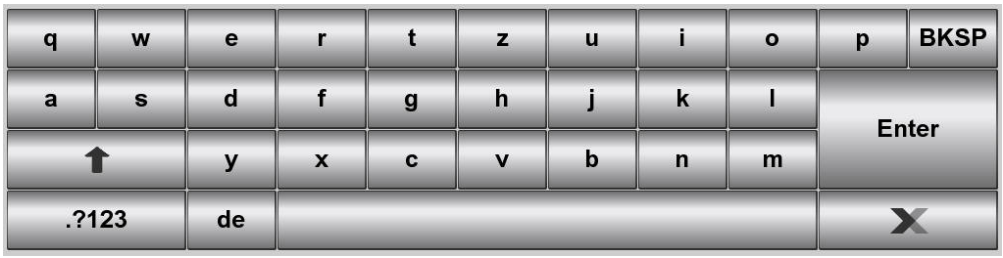
About Screen

The Oracle icon in the Status Bar navigates to the About Screen. The About screen contains the Build Version Number, the Copyright information and the general disclaimer.

Virtual Keyboard

Whenever an alphanumeric input is possible, the virtual keyboard is shown.

Figure 1–2 Virtual Alpha Keyboard



Note: You can switch between keyboard layouts in the Xstore Point-of-Service, Lane Checkout User Interface. For example, press en for the English and de for the German layout. The Xstore Point-of-Service, Lane Checkout User Interface supports 11 languages. For more information, refer to the *Oracle Retail Xstore Suite Implementation and Security Guid*e.

Figure 1–3 Virtual Numeric Keyboard

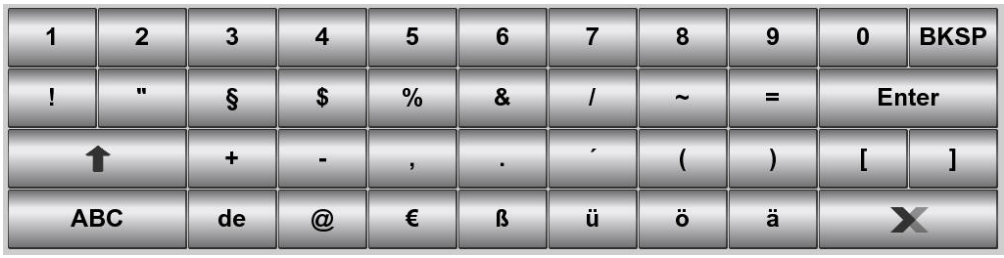


Table 1–4 describes possible functions of the Virtual Keyboard.

Table 1–4 Virtual Keyboard Navigation

Function	Navigation
Launch virtual keyboard	Choose one of the following options to launch the virtual keyboard: ▪ Tap the keyboard icon in the Status Bar to launch the keyboard. ▪ The keyboard is automatically prompted when you select an input field in the item or customer search.
Switch from alpha keyboard entry to numeric entry	The keyboard is alpha-numeric. The default view is the alpha keyboard. To switch to the numeric entry, select the **.?123** button.
Data entry	Tap the keyboard keys to enter information into the field.
Close virtual keyboard	Choose one of the following options to close the virtual keyboard: ▪ Swipe down the keyboard on the Operator Display. ▪ Select the keyboard icon within the Status Bar.

Customer Display

The Customer Display shows the following sections:

1. Advertisement Banner
2. Retail Logo
3. Sales transaction information, such as:
   - Transaction number
   - Number of items added to the Cart
   - Total savings
   - SKU, the Stock Keeping Unit
   - Item, the item description
   - Quantity, the entered quantity, in format QTY @ Price or Price/Weight
   - Price - extended item amount (actual Price x Quantity)
4. Transaction Discount

   The field Transaction Discount displays the total amount of manually applied transaction discounts, if configured
5. Subtotal

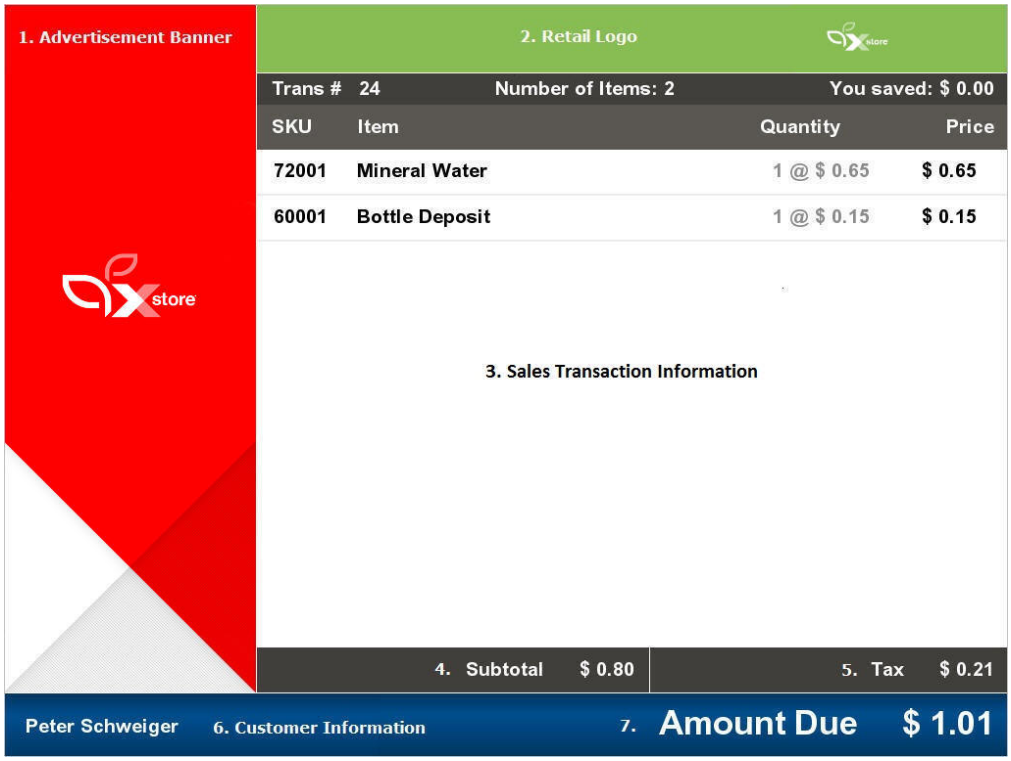
   The field Subtotal shows the amount of the items that have been entered.
6. Tax

   If configured, the Tax field shows the current tax of entered items.
7. Customer Information

   If a customer is linked to the sales transaction, the customer name as well as award and loyalty point information is displayed on the Customer Display.
8. Amount Due/Change Due

   The Amount Due field shows the current amount due of the entered items. After tendering, the Change Due amount is displayed in this field.

Figure 1–4 Customer Display - Screen Layout



Code Functions

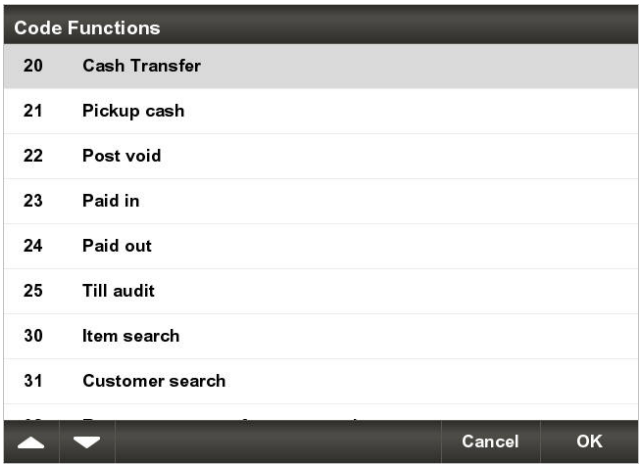
You can view the available code functions in the Xstore Point-of-Service, Lane Checkout User Interface. There are two ways to view the available code functions.

1. Press the **Code** menu button.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section.

2. You are prompted for the code. Enter 88.
3. The system displays the available code functions.

Figure 1–5 Code Functions



Or

1. Enter 88 and press menu button **Code**.
2. The system displays the available code functions.
3. Select the corresponding code function with the up and down arrows and press **OK**. The system performs the selected function.

Privileges

The Xstore Point-of-Service, Lane Checkout User Interface offers the possibility to configure privileges for individual users. To access a functionality, you may need a certain privilege.

Override

1. If you do not have sufficient security privileges to carry out a certain activity, the Xstore Point-of-Service, Lane Checkout User Interface shows the Override information and prompts for the user name.
2. Users holding the required security privileges, must follow the steps below to carry out the security override.
   a. Enter your user name and press **Enter**.
   b. Enter your password and press **Enter**.
3. Carry out the initiated function.

2

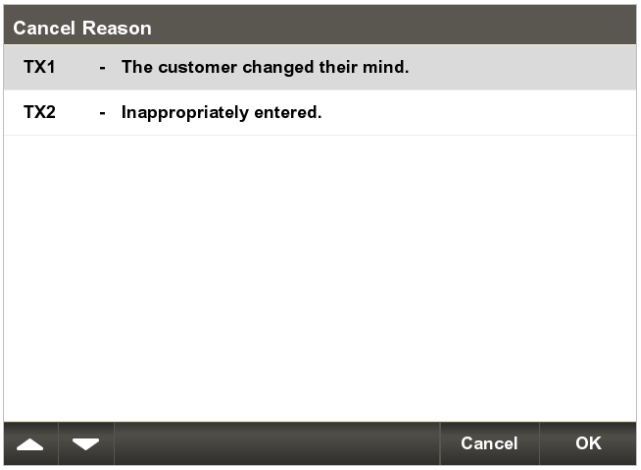
Prompts

During various operations, you may be prompted to confirm a procedure, select from a list of options, acknowledge a system action, or select information. The Xstore Point-of-Service, Lane Checkout User Interface provides different types of prompts to help you complete a task. This chapter provides an overview of the available prompts in the Xstore Point-of-Service, Lane Checkout User Interface.

Selection Required Prompt

During a transaction process, you may be required to select from a list of options. For example, in the prompt below, you would use the up and down arrows to select a reason from the list. To save your selection press **OK**. To exit without making a selection, press **Cancel**.

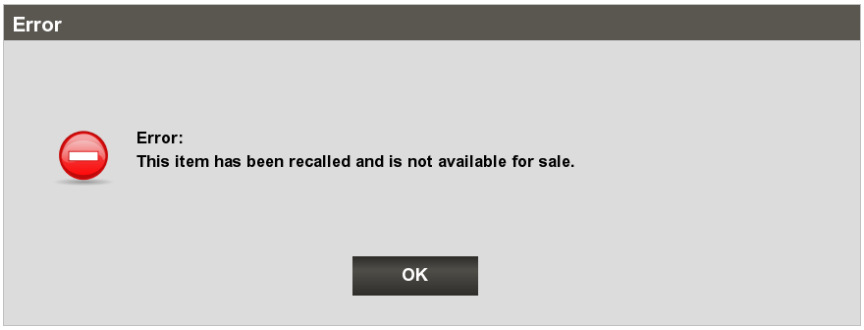
Figure 2–1 Selection Required Prompt



System and Error Information Prompt

The system displays prompts and messages to indicate that the system is processing a request or transaction, or to provide additional information about a process or error.

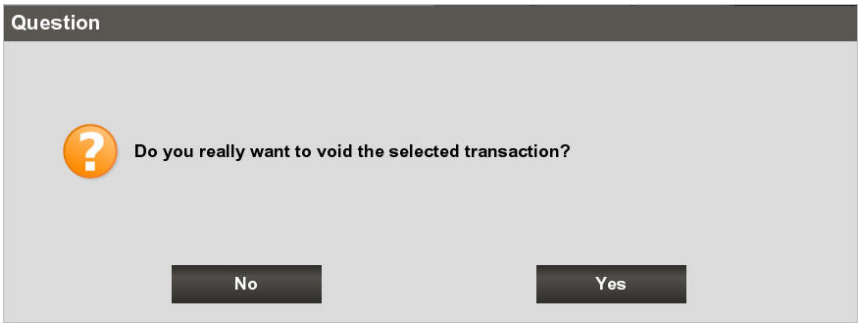
Figure 2–2 System and Error Information Prompt



Response Required Prompt

During a transaction, you may be required to confirm an action. For example, in the prompt below you would press **Yes** to void the selected transaction and **No** to exit the Post Void Transaction function.

Figure 2–3 Response Required Prompt



Item Prompts

You can implement various item prompts in the Xstore Point-of-Service, Lane Checkout User Interface. Possible item prompts are outlined below.

Entry Required Prompt

You can configure an entry required prompt.

1. Enter a corresponding item.

2. The system prompts, for example, for the manufacturer.

Figure 2–4 Item Prompt - Entry Required Prompt

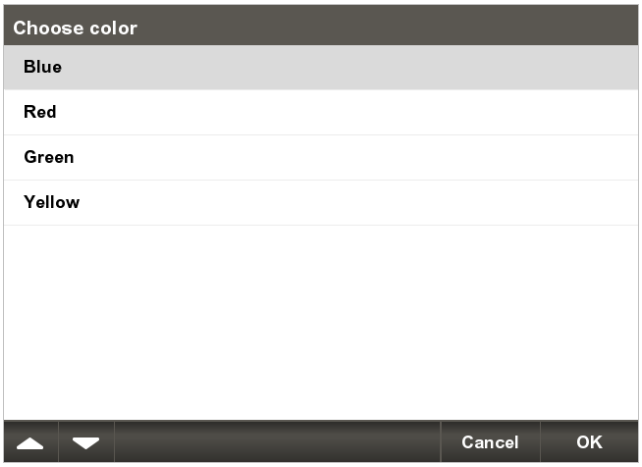
3. Enter the manufacturer and press **Enter**.
4. The item is displayed on the Sales Display Panel.

Selection Required Prompt

You can also configure a selection required prompt for an item in the Xstore Point-of-Service, Lane Checkout User Interface.

1. Enter a corresponding item.
2. The system, for example, displays a color selection.

Figure 2–5 Item Prompt - Selection Required Prompt



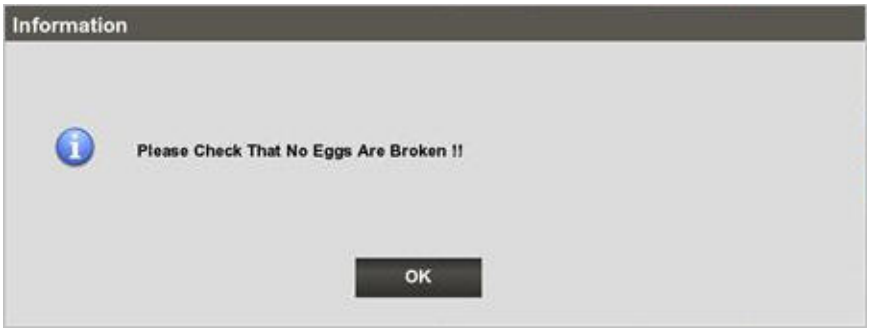
3. Select the corresponding color and press **OK**.
4. The item is displayed on the Sales Display Panel.

Information Prompt

You can also configure a system information prompt for an item in the Xstore Point-of-Service, Lane Checkout User Interface.

1. Enter a corresponding item.
2. An information prompt for the entered item is displayed.
3. Press **OK** to exit the information prompt.

Figure 2–6 Information Prompt



Transaction Prompts

You can implement various transactions prompts in the Xstore Point-of-Service, Lane Checkout User Interface. Currently the following three different transaction prompts are available:

- Prompt when starting a sales transaction
- Prompt before tendering takes place
- Prompt after tendering

Pre-Sale

You can implement a prompt at the beginning of a sales transaction, for example, prompt for the customer number.

1. Enter the first item of a sales transaction.
2. The system prompts, for example, for the customer number.
3. Enter the customer number and press **Enter**.
4. Proceed with the sales transaction as usual.

Pre-Tender

You can implement a prompt before tendering a sales transaction.

1. After you have entered all items, press **Total**.
2. The system displays, for example, a selection required prompt.
3. Select the corresponding entry and press **OK**.
4. Complete the sales transaction as usual.

Post-Tender

You can implement a prompt after tendering a sales transaction, for example, ask for the postal code (zip code).

1. After you have selected the type of payment, the system prompts, for example, for the postal (zip) code.
2. Enter the postal (zip) code and press **Enter**.
3. The transaction is completed.

3

Basic Transaction Entry

A basic sales transaction consist of the exchange of items for a customer's tender. This chapter describes how to enter items in the Xstore Point-of-Service, Lane Checkout User Interface and gives an overview on barcodes with properties and attached items.

Basic Transactions

You can enter items in different ways:

- Enter item number or UPC manually via Numeric Pad or keyboard, if configured.
- Use the Department Lookup to add an item to the transaction.
- Choose the item from the Quick Pick screen.
- Scan the barcode of the item (if barcode scanner is attached).
- Use the Item Search to look up and add an item to the sales transaction.

  For more information about how to search for an item, see Chapter 11, "Item Search."

Enter Items Manually

1. Enter the item number or UPC and press the **PLU** menu button.

> **Note:** If you want to delete the last entered number on the focus bar, use the ← menu button. To delete all entered numbers, use **C** (Clear).

2. The Xstore Point-of-Service, Lane Checkout User Interface displays the item on the Sales Display Panel and on the Customer Display.

Figure 3–1 Operator Display - Sales Screen

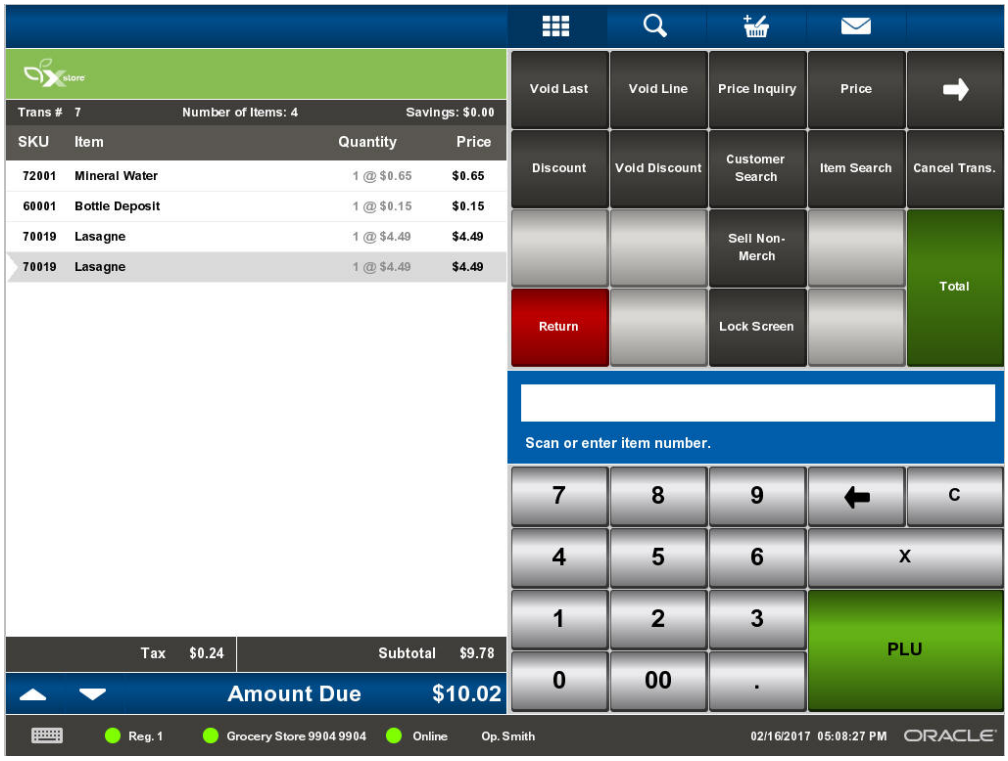
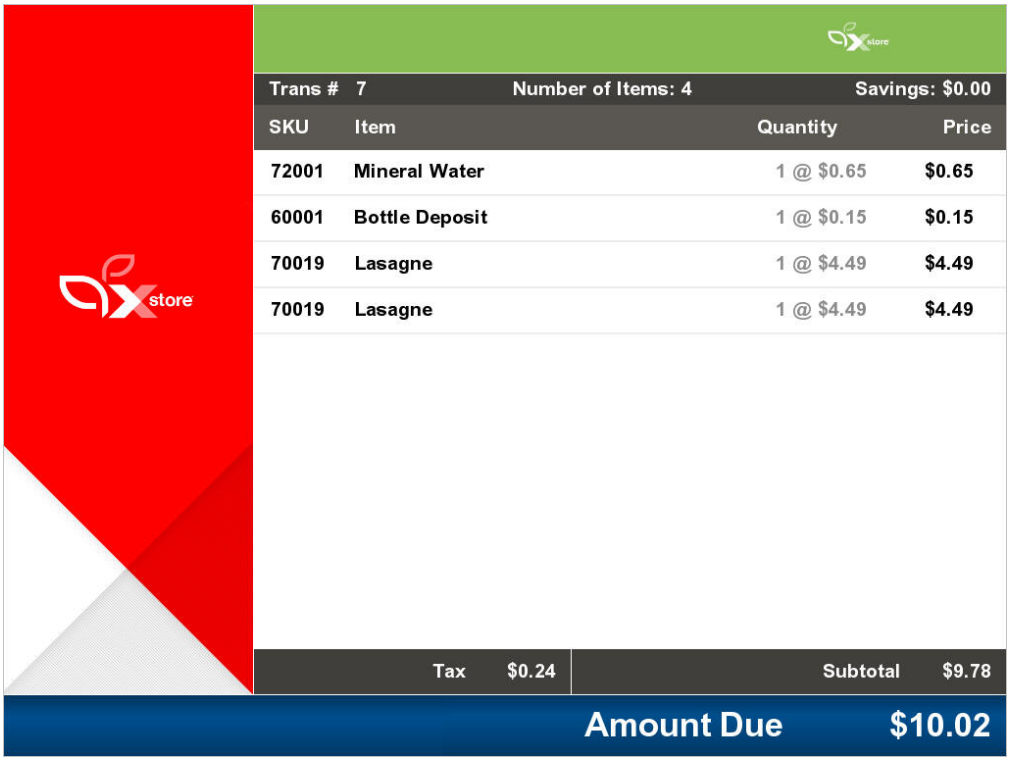


Figure 3–2 Customer Display - Sales Screen



Department Lookup

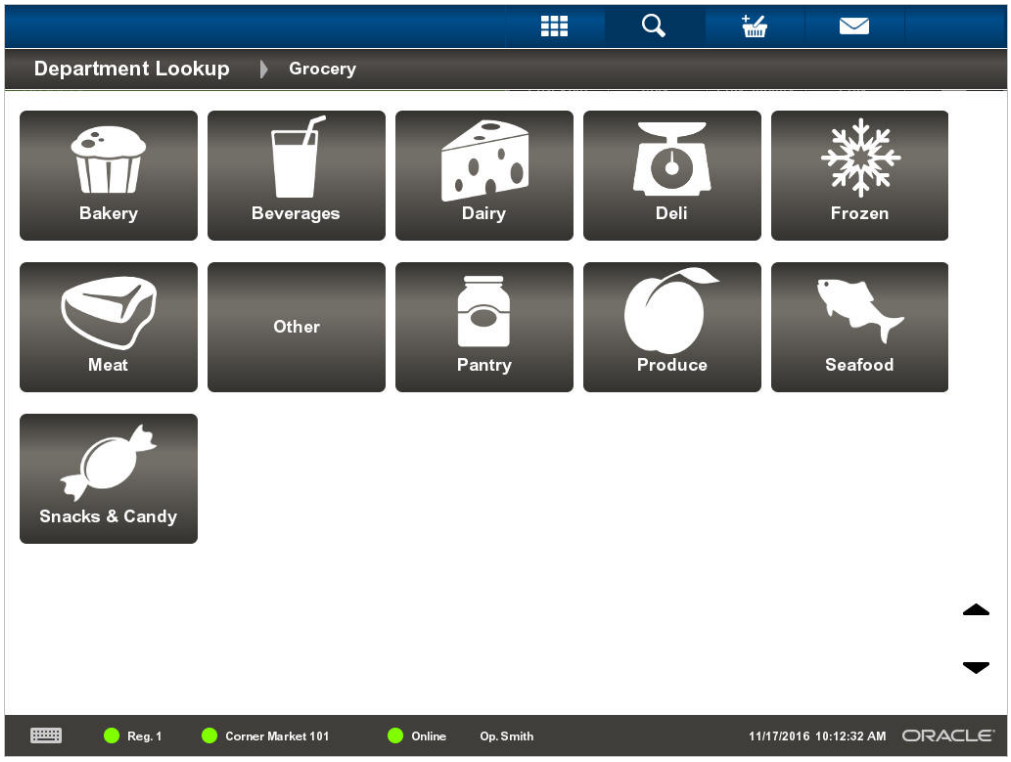
The Department Lookup contains a list of departments, in which you can drill down to a specific sub-category. The number of departments, sub-category levels within a department, and the number of items are configurable.

To add an item to the sale transaction by using the department lookup, follow the steps below.

1. Select the Department Lookup icon in the Tab Menu.
2. Select a department.

Note: Use the Menu Button icon to return to the Sales Display Panel.

Figure 3–3 Department Lookup - Departments



3. You can add an item from Department Lookup by selecting the item in the category/sub-category. You can only add one item at a time using this functionality.
4. Use the arrows, or swipe to scroll through the displayed items. Select an item.
5. The Xstore Point-of-Service, Lane Checkout User Interface displays the item on the Sales Display Panel and on the Customer Display.

Quick Pick

The Quick Pick contains items that are frequently purchased. This option allows you to add frequently purchased items more easily.

To add an item to the sale transaction by using the quick pick option, follow the steps below.

1. Select the Quick Pick icon in the Tab Menu. Frequently purchased items are displayed.
2. Use the up and down arrows, or swipe to scroll through the displayed items. Select an item to add to the Cart.
3. The Xstore Point-of-Service, Lane Checkout User Interface displays the item on the Sales Display Panel and on the Customer Display.

Scan Barcode

1. Scan the barcode of the item.
2. The Xstore Point-of-Service, Lane Checkout User Interface displays the item on the Sales Display Panel and on the Customer Display.

Note: The function is only available, if a barcode scanner is attached.

Barcodes with Properties

This section describes all possible barcodes with properties.

Weight in Barcode

If you scan the barcode below, the system converts the data in the given order and sells the weight of the barcode item.

Example 3–1 Weight in Barcode

2150101020006

(21) Weight prefix, (50101) Item number, (02000) weight in grams = 2,0 kg, (6) Check sum

Note: If the store has a service or self-service scale, creating barcodes with encoded weight, the system decodes the label and sells the item (coded in the barcode) with the calculated price.

Calculated Price = Item price x Weight from the barcode

Quantity in Barcode

If you scan the barcode below, the system converts the data in the given order and sells the quantity of the barcode item.

Example 3–2 Quantity in Barcode

2570018000036

(25) Quantity prefix, (70018) Item number, (00003) Quantity number, (6) Check sum

Note: If the store has a service or self-service scale, creating barcodes where the quantity is coded, the system decodes the label and sells the item (coded in the barcode) with the calculated price.

Calculated Price = Item price x Quantity from the barcode.

Price in Barcode

If you scan the barcode below, the system converts the data in the given order and sells for the price of the barcode item.

Example 3–3 Price in Barcode

2250102003005

(22) Price prefix, (50102) Item number, (00300) price (3,00 $), (5) Check sum

Note: If the store has a service or self-service scale, creating barcodes where the price is coded, the system decodes the label and sells the item with the price from the barcode.

Press Barcode with Age Verification

If you scan the barcode below, the system converts the data in the given order and sells the press product barcode with the age verification.

Example 3–4 Press Barcode with Age Verification

4343000105396

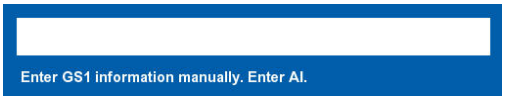
(43) Prefix with age verification, (4) full VAT, (30001) item number, (0539) price 5,39 $, (6) Check sum

Manual GS1 Entry

If you cannot scan a barcode, use the **Manual GS1 Entry** menu button to enter the barcode, for example, (01) 02570016000052.

1. Press the **Manual GS1 Entry** menu button.
2. You are prompted for the AI. Enter the application identifier (AI) - the number shown in brackets, for example, (01) and press **Enter**.

Figure 3–4 Manual GS1 Entry - AI

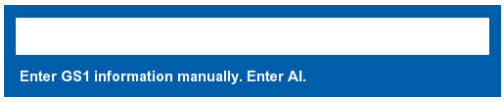


3. You are prompted for the value. Enter the digits after the AI - number in brackets, for example, 02570016000052 and press **Enter**.

Figure 3–5 Manual GS1 Entry - Value

4. The system shows the following prompt.

Figure 3–6 Manual GS1 Input



5. Repeat the process until you have entered the entire barcode. Press **Enter** with no input to finish the Manual GS1 Entry. The item is shown on the Sales Display Panel. Complete the transaction as usual.

Note: To cancel the Manual GS1 Entry, press **C** (Clear).

Attached Items

The Xstore Point-of-Service, Lane Checkout User Interface offers the possibility to create attached items, to sell bottle deposits, for example, for mineral water. The system shows the attached item on the Operator and Customer Display.

Figure 3–7 Operator Display - Attached Items Sales Display Panel

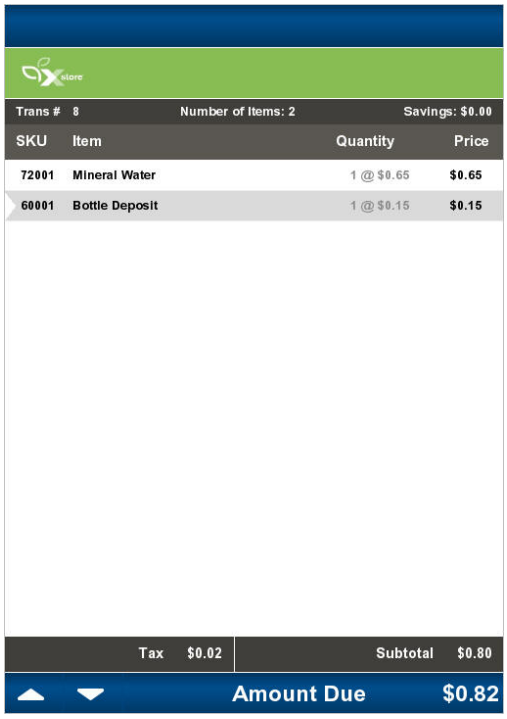
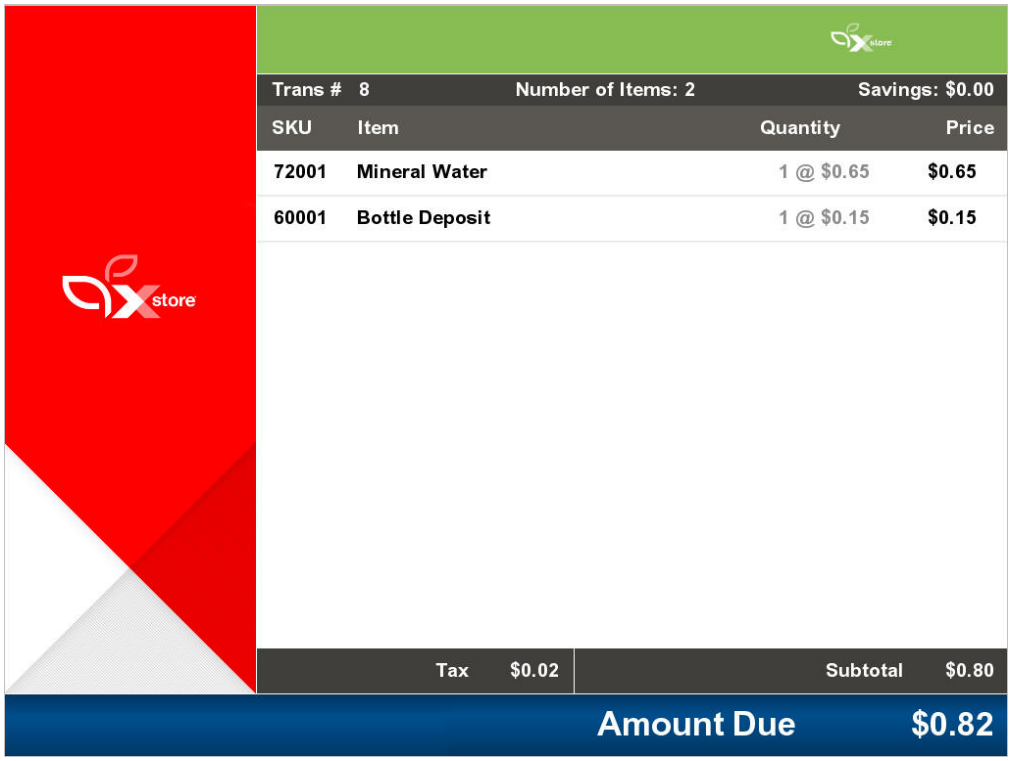


Figure 3–8 Customer Display - Attached Items



Note: If you void the main item, the attached item is also voided. For more information about how to void items, see the "Voiding Items" section in Chapter 6.

4

Weighted Items

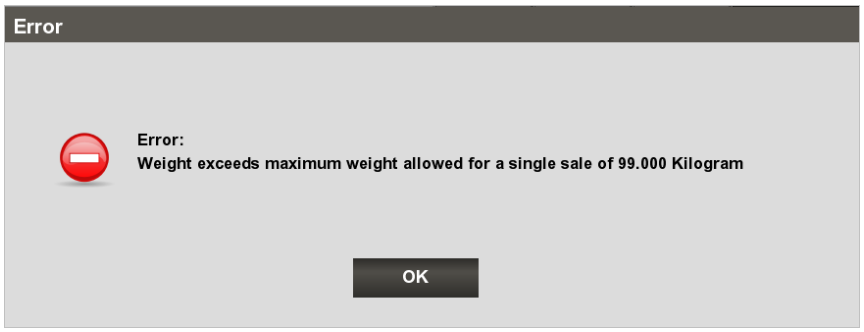
Weight items are marked with a weight-required flag in the item record. This chapter describes how to enter weighted items in the Xstore Point-of-Service, Lane Checkout User Interface.

Note: The function Repeat Last Item is not available for weighted items. For more information about this function, see the "Repeating the Last Item"section in Chapter 6.

Minimum and Maximum Weight

You can define a minimum and maximum weight for the individual item. If the entered weight is more than the maximum or less than the minimum weight, the system displays a corresponding message. In the example below, the weight exceeds the maximum weight for a single sale.

Figure 4–1 Example - Maximum Weight

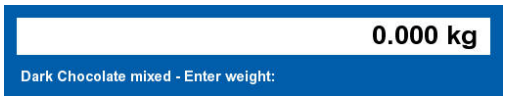


Enter Weighted Items

Follow the steps below to key in the weight manually.

1. Select a weighted item.
2. You are prompted for the weight.

Figure 4–2 Prompt Weight Item



3. Enter the weight and press **Enter**.
4. The system displays the item with the calculated price on the Sales Display Panel and the Customer Display.

Figure 4–3 Operator Display - Weighted Item

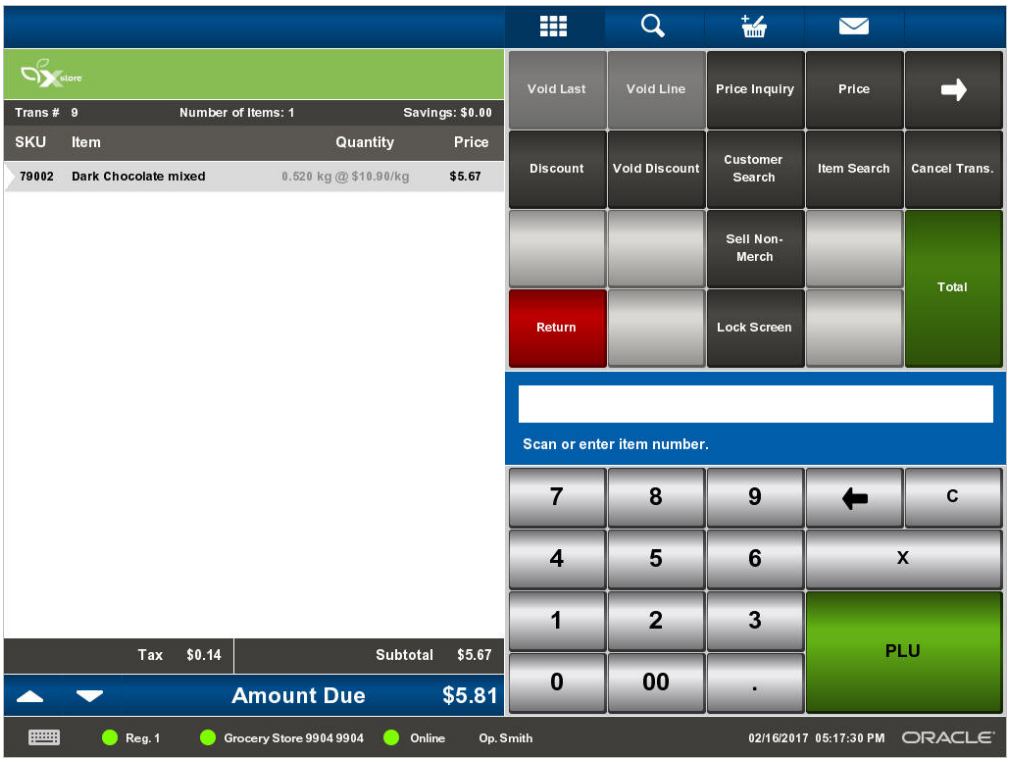
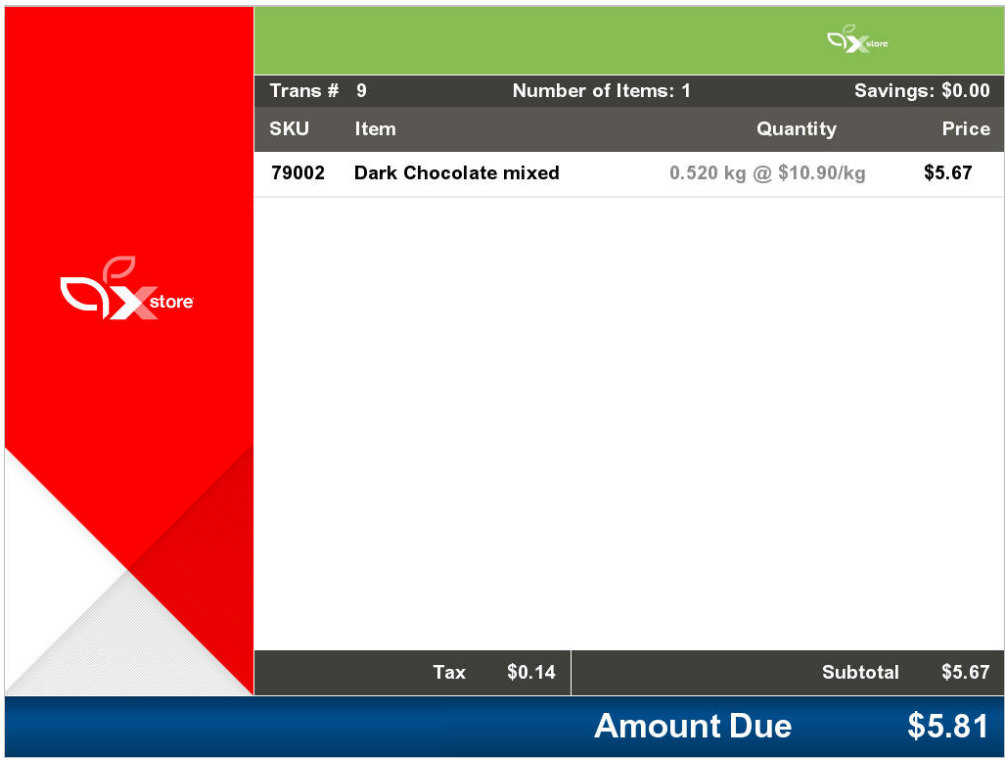


Figure 4–4 Customer Display - Weighted Item



5

Processing Tenders

Tendering takes place when you select the method of payment and complete the transaction. This chapter describes the tender process with the available tender types and possible receipt printing functions. The following tender types are available:

- Cash
- Coupon
- Traveler's Check
- Foreign Currency
- Debit Card/Credit Card
- Debit Card Manual Authorization
- House Account

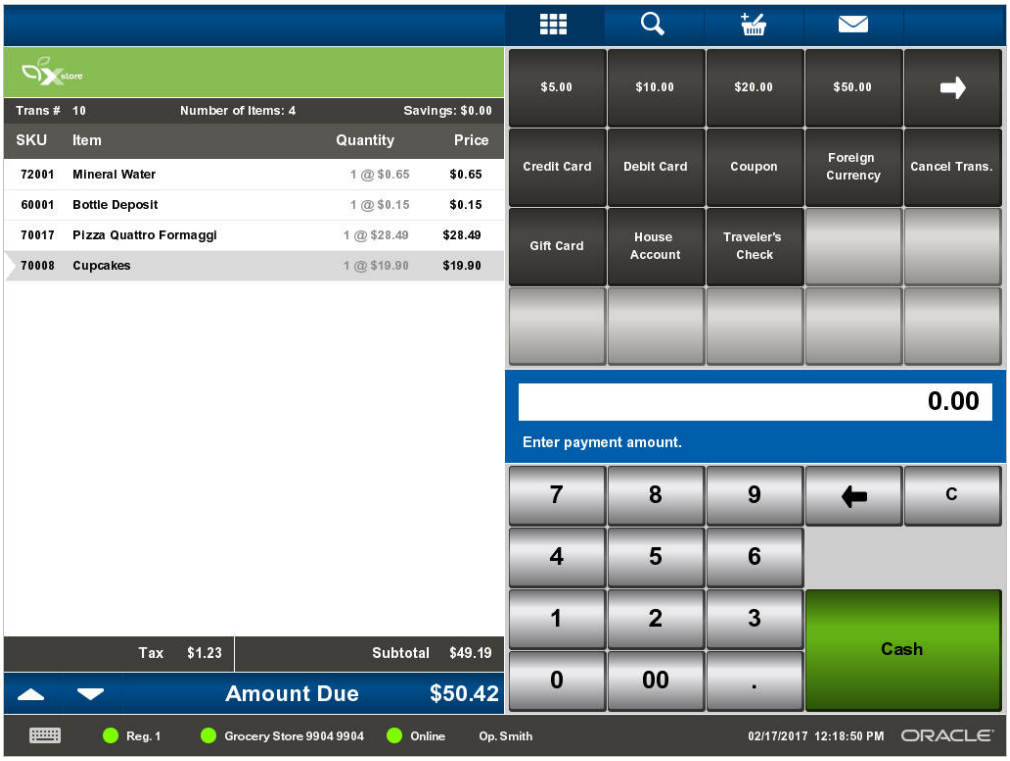
Note: The **C** (Clear) button will be enabled after tendering, if there is no till (cash drawer) configured for a register.

Cash

If the customer wants to pay Cash, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sales Tender screen.

Figure 5–1 Operator Display - Sales Tender Screen



2. The total amount of the sales transaction is shown. Enter the tender amount via the Numeric Pad or select the amount from the Menu Buttons, for example, $5 Cash.

   If you use the Menu Buttons the sale is completed automatically, if the selected amount is higher than the amount due.

Note: The system interprets the entered numbers as cents from the right to the left. For example, if you enter 599 and press **Cash**, the system interprets the amount as $5.99.

---

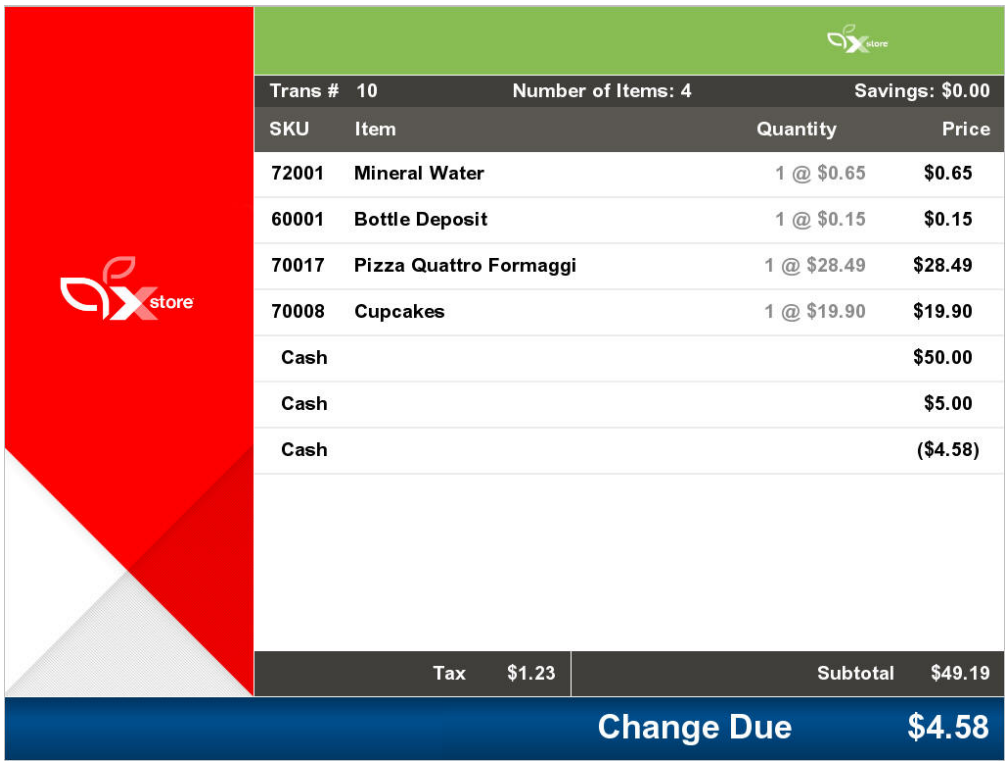
3. Select the tender type **Cash**.

Note: If you enter the received amount via the Menu Buttons, the tender amount is applied immediately. You do not have to press the tender type **Cash**.

---

4. The sale is completed. The system displays the Change Due and prints the receipt.

Figure 5–2 Customer Display - Sale Completed



5. You are prompted to close the till (cash drawer).

Note: If there is no till attached, press **C** (Clear) to return to the Sales screen.

Coupon

If the customer wants to use a Coupon for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sales Tender screen.
2. Enter the amount of the received coupon and press **Coupon**.
3. You are prompted for the coupon ID. Scan, or enter the coupon ID and confirm with **Enter**.
4. The Coupon is applied. If no remaining amount is due, the receipt is printed.
5. You are prompted to close the till (cash drawer).

Note: If there is no till attached, press **C** (Clear) to return to the Sales screen.

Traveler's Check

If the customer wants to use a Traveler's Check for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sales Tender screen.
2. Enter the amount you received and press **Traveler's Check**.
3. If no remaining amount is due, the sale is completed. The system displays the Change Due. The receipt is printed.
4. You are prompted to close the till (cash drawer).

Note: If there is no till attached, press **C** (Clear) to return to the Sales screen.

Foreign Currency

If foreign currencies are available for tender, they are listed under **Foreign Currency**.

1. After you have entered all items, press **Total** to complete the sale. The system displays the Sales Tender screen.
2. Press **Foreign Currency**.
3. The system displays a prompt with all available currencies. The Amount Due is shown in the local as well as in all available foreign currencies.
4. Select the corresponding currency and press **OK**. The amount is shown in the Focus Bar.
5. Confirm the amount or change the displayed amount. Press **Enter**.
6. If no remaining amount is due, the transaction is completed. The amount is shown in the foreign currency and in your local currency. The system displays the Change Due. The receipt is printed.
7. You are prompted to close the till (cash drawer).

Note: If there is no till attached, press **C** (Clear) to return to the Sales screen.

Debit Card/Credit Card

If the customer wants to use a Debit Card or Credit Card for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sales transaction. The system displays the Sales Tender screen.
2. Press **Debit Card** or **Credit Card**.
3. The prompts displayed on the terminal may vary depending on the payment system your store uses.

Note: If the authorization is offline, see the Debit Card Manual Authorization section. If the authorization is declined, see the Debit/Credit Card Authorization Fails section.

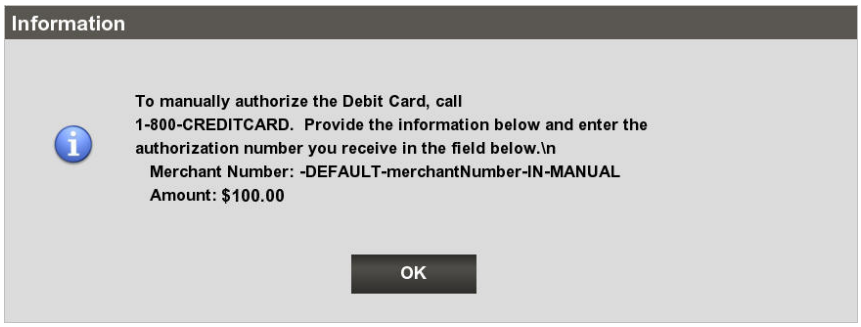
Debit Card Manual Authorization

Note: Depending on your provider the Debit Card Manual Authorization might not be available. If the Debit Card Manual Authorization is not available and the authorizer is offline, you cannot tender the transaction with a Debit Card/Credit Card.

If the customer wants to use a Debit Card for payment, follow the steps listed below.

1. After you have entered all items, press **Total** to complete the sales transaction. The system displays the Sales Tender screen.
2. Press **Debit Card**.
3. The system sends an authorization request to the Debit terminal.
4. If the request is not successful, the following prompt is shown.

Figure 5–3 Debit Card Manual Authorization



5. Call the suggested number and provide the corresponding information. Complete the prompt with **OK**.
6. Enter the authorization number and press **Enter**.
   - If the authorization number is not accepted, a corresponding prompt is displayed.
     - Press **Cancel** to return to the Sales Tender screen and select a new tender type.
     - Press **Retry** to resend the authorization number.
     - Press **Manual** to return to the manual authorization prompt.
   - If the authorization number is accepted, the sales transaction is completed. The system prints the receipt.

Debit/Credit Card Authorization Fails

If the authorization of the Debit or Credit Card fails or is declined, the system shows a corresponding prompt.

- Press **Cancel**, the tender type, for example, Debit or Credit Card, is voided and displayed on the Sales Display Panel.
- Press **Retry** to restart the tender authorization process.

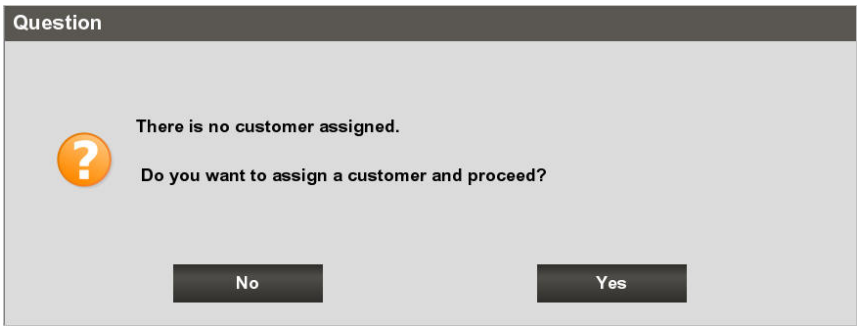
House Account

A House Account allows a customer to use an in-house account as a form of tender and to make payments to this account. This type of account must be activated to be used as tender by the customer.

Several customer names can be saved for one house account. However, the system always gives the primary customer name on the receipt. The field **Picked up by** may contain the name of a different house account user.

1. Assign a customer with an active house account to the sales transaction. For more information about how to assign a customer to the current sales transaction, see the "Linking a Customer to a Transaction" section in Chapter 10.
   a. If you do not assign a customer to the current sales transaction, the system prompts you to assign a customer to the transaction.

Figure 5–4 Prompt - Assign Customer



2. Enter items and press **Total**. The system displays the Sales Tender screen.
3. Select the tender type **House Account**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

4. The system shows all users (customers) assigned to this house account. Select the corresponding house account user and press **OK**.
5. You are prompted for the amount you would like to charge to the house account.
   - Enter the total amount of the sales transaction and press **Enter**. The sales transaction is completed.
   - Enter the partial amount of the sales transaction and press **Enter**. Select another tender type to complete the sales transaction.

Exceed Credit Limit House Account

Note: You can set a credit limit for house accounts in Oracle Retail Xstore Point of Service (Back Office). You can also overpay a house account up to a configured amount. However, the payment must be authorized by users holding the required security privileges. If the amount exceeds the overpayment amount, the system displays an error message. You cannot complete the transaction with the tender type house account. For more details, see - *Oracle Retail Xstore Point-of-Service User Guide*.

1. Assign a customer with an active house account to the sales transaction. For more information about how to assign a customer to the current sales transaction, see the "Linking a Customer to a Transaction" section in Chapter 10.
2. Enter items and press **Total**. The system displays the Sales Tender screen.
3. If the total of your sales transaction exceeds the credit limit, the system displays a corresponding message.
4. Users holding the required security privileges can complete the sales transaction.
5. Press **OK** to close the message.
   a. Enter your user name and press **Enter**.
   b. Enter your password and press **Enter.**
6. The sales transaction is completed.

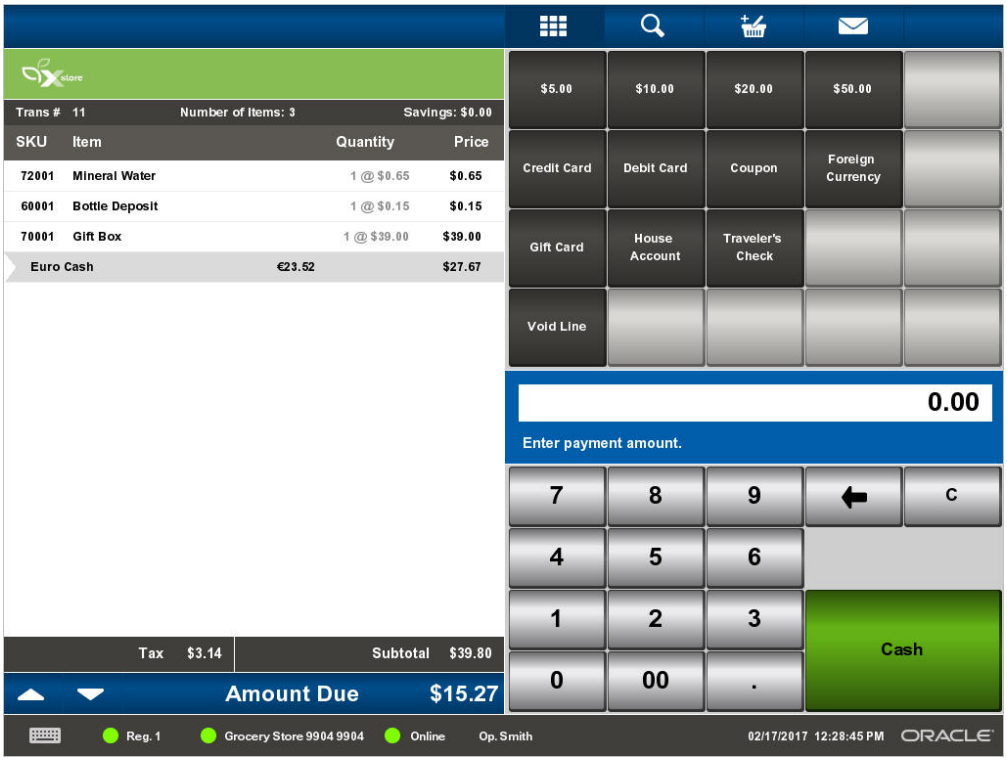
Splitting Tenders

Note: You may enter a partial amount if the purchase is paid with more than one tender type. After selecting a tender type, enter the amount and press **Enter**. The system automatically prompts for the remaining balance due and you may select any of the valid tender types.

For example, if the customer wants to use the local and a foreign currency for payment, follow the steps outlined below.

1. After you have entered all items, press **Total**. The system displays the Sales Tender screen.
2. Press **Foreign Currency**. The Xstore Point-of-Service, Lane Checkout User Interface displays a prompt with all available currencies. The Amount Due is shown in the local as well as in all available foreign currencies.
3. Select the corresponding foreign currency.
4. The total Amount Due is shown in the Focus Bar. Enter the new amount in the Focus Bar and press **Enter**.
5. The partial tender amount is shown on the Sales Display Panel and the Customer Display.

Figure 5–5 Split Tenders - Foreign Currency

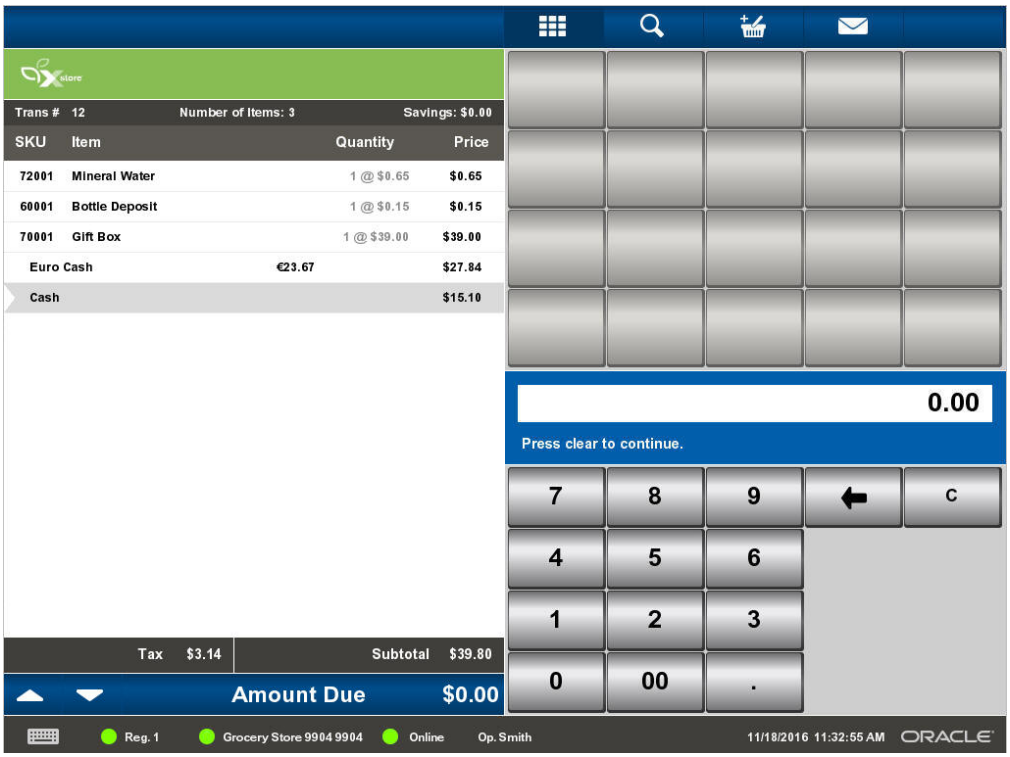


6. Enter the remaining tender amount via the Numeric Pad or select the amount from the Menu Buttons, for example, $5.00 Cash.
7. Select the tender type **Cash**.

> **Note:** If you enter the received amount via the Menu Button, the sale is completed immediately. You do not have to press the tender type **Cash**.

8. The sale is completed. The system displays the foreign and local tender type, as well as the Change Due. The receipt is printed.

Figure 5–6 Split Tenders - Foreign and Local Currency



9. You are prompted to close the till (cash drawer).

> **Note:** If there is no till attached, press **C** (Clear) to return to the Sales screen.

Voiding a Tender Type

You can void a selected tender type in the Sales Tender screen. To void a tender type, follow the steps below.

1. After you have entered all items, press **Total**. The system displays the Sales Tender screen.
2. Select the desired tender type.
3. The **Void Line** menu button enables. Press **Void Line**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

4. You are prompted for the tender type. Select a tender type in the Sales Display Panel and press **Enter.**
5. The system displays void tender reasons. Select a reason and press **OK**.
6. You are prompted for a comment. Enter a comment, if necessary and press **OK**.

7. The tender type is indicated as voided on the Sales Display Panel and on the Customer Display.

House Account Payment

To make payments to a certain house account, follow the steps below.

1. Choose a customer with an active house account. For more information about how to search for a customer, see the "Linking a Customer to a Transaction"section in Chapter 10.
2. Press **House Account Payment**.
3. The system shows all users (customers) assigned to this house account. Select the corresponding house account user and press **OK**.
4. Enter the payment amount and press **Enter**.
5. Enter the payment date and press **Enter**.
6. Enter the invoice number and press **Enter**.
7. The system shows the house account payment on the Sales Display Panel.
8. Complete the transaction as usual or enter additional items.

House Account Reversal

You can also void a payment made to the house account.

1. Select the corresponding customer. For more information about how to search for a customer, see the "Linking a Customer to a Transaction" section in Chapter 10.
2. Press **House Account Reversal**.
3. The system displays all house account payments. Select the corresponding payment and press **OK**.
4. The system shows reasons for voiding the house account payment. Select the corresponding reason and press **OK**.
5. The house account payment is voided and shown on the Sales Display Panel.
6. Press **Total** and complete the transaction with the corresponding tender type, for example, Cash.

No Sale

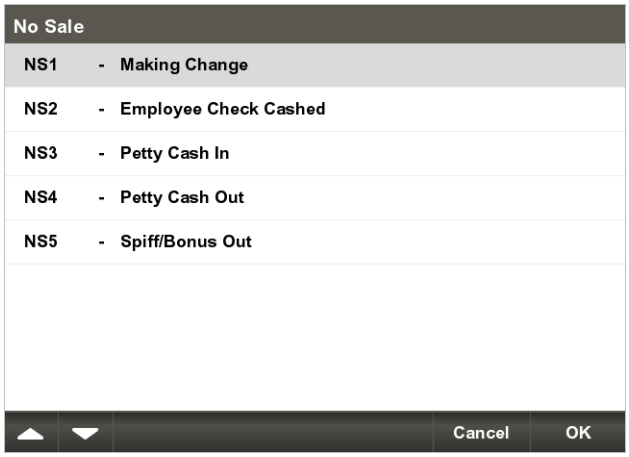
Use the No Sale option to open the cash drawer for a reason other than a normal sales transaction.

1. Press **No Sale**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. The system shows various reasons for a no sale transaction.

Figure 5–7 No Sale - Reasons



3. Choose the corresponding no sale transaction and press **OK**.
4. The cash drawer opens. Carry out the No Sale transaction, for example, to make change.

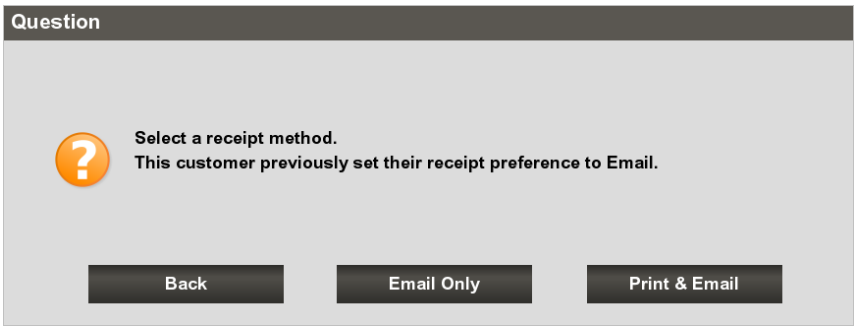
E-Mail Receipt

Xstore Point-of-Service offers the possibility to create e-mail receipts. Depending on your system's configuration, the function e-mail receipt might be enabled. If enabled, you need to select the receipt method.

E-Mail Receipt - Customer Request

The customer can request an e-mail receipt. If the receipt preference is set to e-mail, you need to select the receipt method. The following options are available:

Figure 5–8 Select Receipt Method



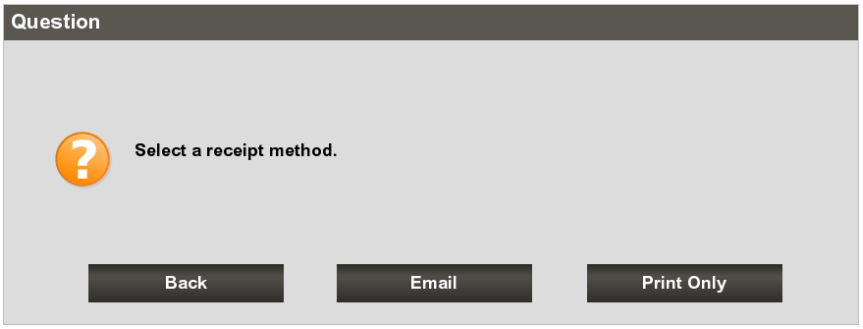
- **E-mail only** - Receipt is e-mailed to the customer (customer copy only).
- **Print & Email** - Receipt is printed and e-mailed to the customer.
- **Back** - Cancel printing and return to tendering.

Note: This prompt replaces the 'transaction complete' prompt, if enabled.

General E-Mail Receipt

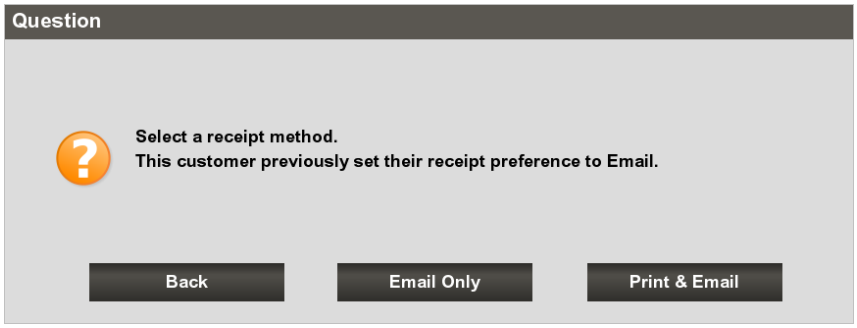
If the e-mail receipt option is generally enabled, you need to select the receipt option. Choose between **Email** and **Print Only**.

Figure 5–9 Select Receipt Method



- If you select **Email**, a second prompt is displayed. Here you can see the customer preference and you can choose between **EMail Only** or **Print & Email**.

Figure 5–10 Select Receipt Method - Preference



  - If you select **Email Only,** the system asks for the e-mail address. If you added a customer to the transaction, the stored e-mail address of this customer is used as the default entry. The receipt is e-mailed to the corresponding customer.

Updating a Customer's E-Mail Address

If you add a customer to a transaction and the current e-mail address is different from the stored e-mail address or no e-mail address is stored for the customer, you can update/enter the customer's e-mail address at the cash register.

1. After you have selected the tender type, the stored e-mail address is displayed. The virtual keyboard is shown.
2. Change or enter the e-mail address accordingly and press **Enter**. If you want to change the customer profile, confirm the following prompt.
   - **Yes** - New address is stored in the database and the receipt is sent to the new e-mail address.
   - **No** - Entry is rejected and not stored in the database. The receipt is sent to the previous e-mail address.

Selecting a Printer

If the function Select Printer is enabled, you can select a printer for the following receipts:

- Sales receipt
- Cancel transaction
- Post void
- Suspend transaction

To select a printer, follow the steps listed below:

1. The system prompts for a printer.
2. Select the corresponding printer and press **OK**.
3. The receipt is printed on the selected printer.

Sales Tax

If the function Sales Tax is enabled, the operator and customer displays change slightly. The subtotal and the tax value, are shown on the Operator and Customer Display as you add items to the Cart. If the function Sales Tax is activated, the receipt also contains the subtotal and tax.

Pre-Flight Check

The Xstore Point-of-Service, Lane Checkout User Interface offers a pre-flight check, warning the user that the taxes are not configured correctly. An error occurs when VAT and SALES taxes are mixed up. It is possible to mix up SALES tax, GST (Goods and Services Tax) and PST (Provincial Sales Tax), since all of these are sales taxes. The Xstore Point-of-Service, Lane Checkout User Interface displays the Pre-Flight Check when you start the system.

Transaction Completed

Depending on your system's configuration, the system may prompt you if the current sales transaction is completed.

- If you select **Yes**, the transaction is completed and the receipt printed.
- If you select **No,** the system returns to tendering.

Note: When selecting **No** at the prompt, the transaction can be completed by pressing the **Cash** tender button without entering an amount (the response required prompt will reappear).

6

Modifying a Sales Transaction

During a sales transaction you may need to modify the transaction prior to tendering. This chapter explains the following functions:

- Repeating the Last Item
- Voiding the Last Item
- Voiding a Line
- Changing the Quantity of an Item
- Changing the Price of an Item
- Cancelling a Transaction
- Suspending a Transaction
- Resuming a Transaction
- Adding Non-Merchandise Items to the Sale
- Adding Gift Cards to the Sale
- Adding Gift Certificates to the Sale

Repeating the Last Item

To repeat the last entered item, press the **PLU** menu button.

Voiding Items

The Xstore Point-of-Service, Lane Checkout User Interface offers two different ways to void entered items:

- Voiding the Last Item
- Voiding a Line

Voiding the Last Item

The function **Void Last** deletes the last entered item from the sales transaction.

1. To void the last entered item of a sales transaction, press the **Void Last** menu button.

Note: If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. The last item is voided. Depending on your system's configuration the original item is either marked grey or marked with a strike-through on the Sales Display Panel.

   The item is indicated as voided (characters turn red and price turns negative) on the Sales Display Panel and on the Customer Display.

Figure 6–1 Operator Display - Void Last Item

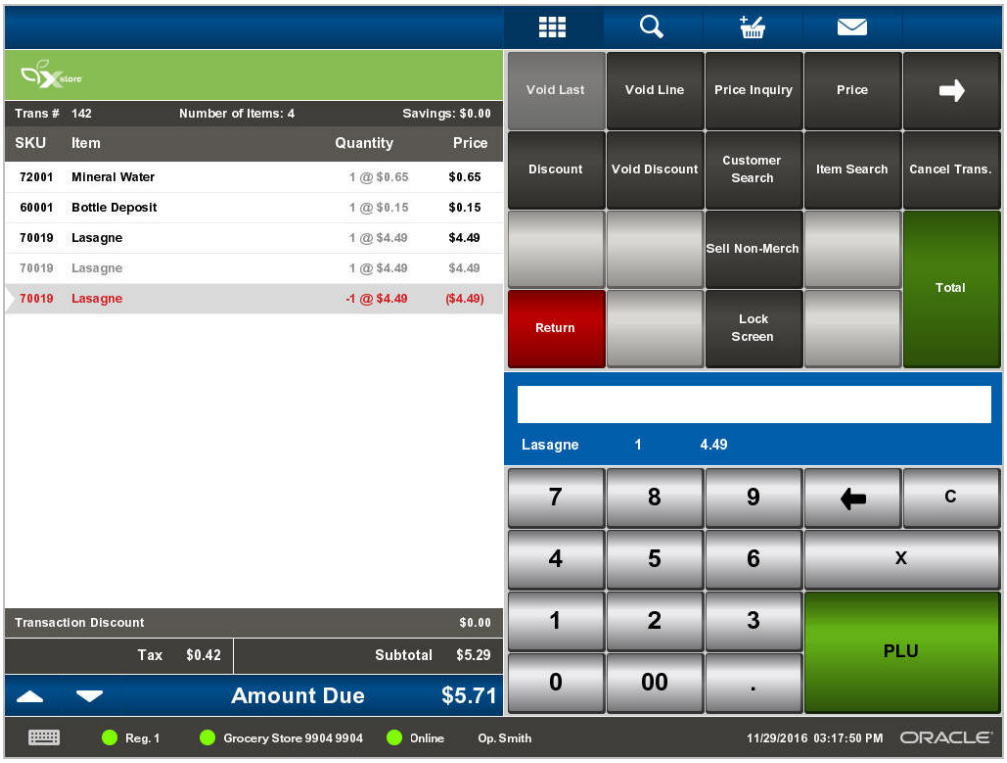
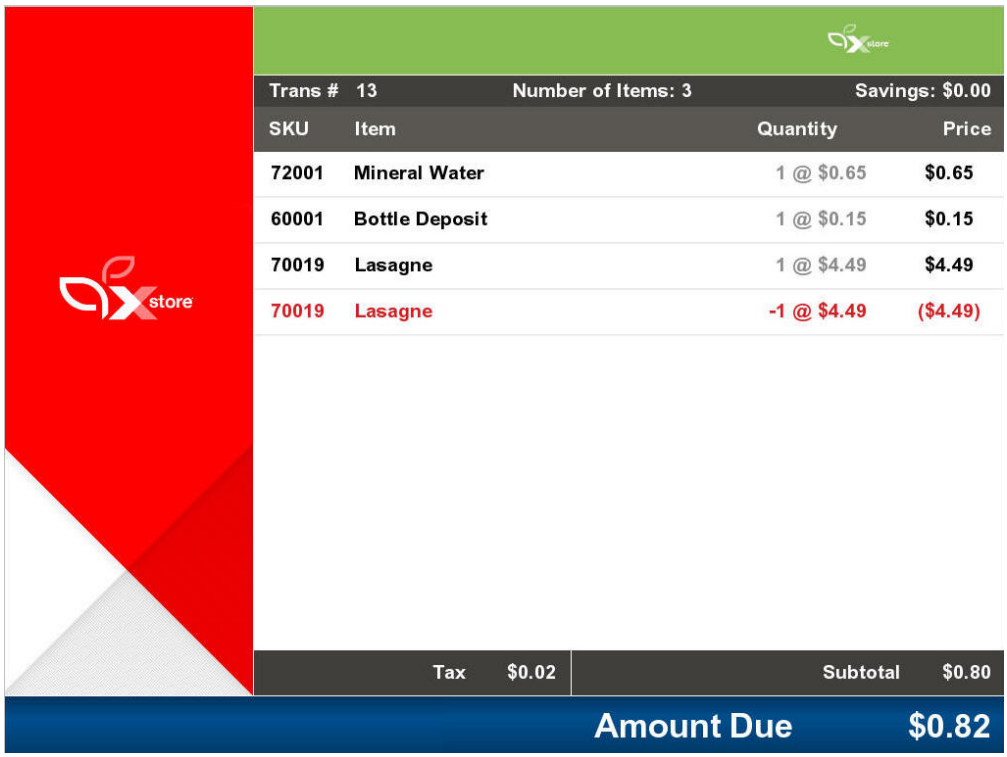


Figure 6–2 Customer Display - Void Last Item



Note: If only one item is entered, the **Void Last** button is disabled. You need to cancel the transaction. For more information about how to cancel a transaction, see the Cancelling a Transaction section.

Voiding a Line

The function Void Line deletes the selected item from the sales transaction. There are two ways to void a line of the current sales transaction.

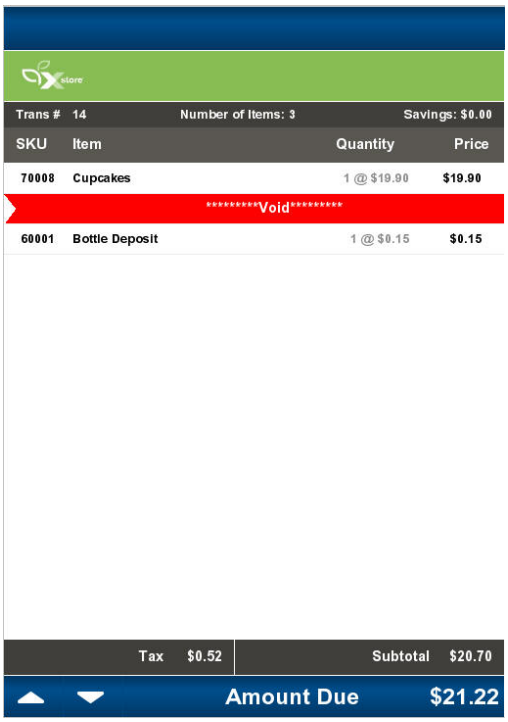
- Swipe
- Void Line Button

Swipe

To void an item by using the swipe function, follow the steps below.

1. Swipe from left to right over an item in the Sales Display Panel. The item is marked red.

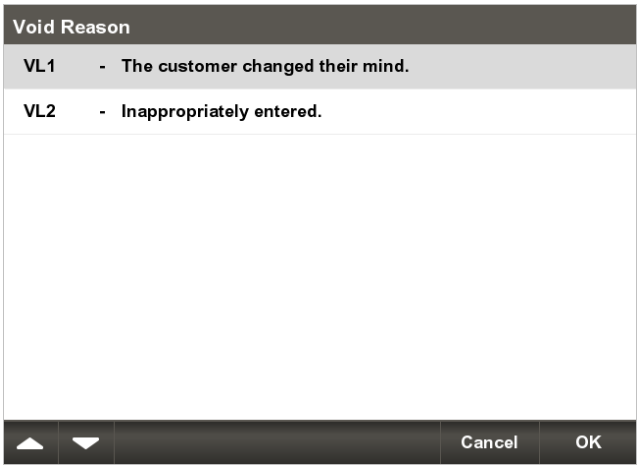
Figure 6–3 Sales Display Panel - Void Line



Note: If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. The system displays void reasons. Select a reason for voiding the line and press **OK**.

Figure 6–4 Void Line - Reasons



3. The item is voided. Depending on your system's configuration the original item is either marked grey or marked with a strike-through on the Sales Display Panel.

   The item is indicated as voided (characters turn red and price turns negative) on the Sales Display Panel and on the Customer Display.

Void Line Button

To void an item by using the **Void Line** button, follow the steps below.

1. Choose **Void Line**.

> **Note:** If only there is only one item remaining in the sales transaction, the **Void Line** button is disabled. If you swipe over the item, an error message is displayed.
>
> If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. You are prompted for the item you would like to cancel.
   - Scan, or enter the item number and press **PLU** or **Enter.**
   - Use the up and down arrows to select the item from the Sales Display Panel. The selected item is marked grey. Press **Enter**.
   - Select the item by using the touch screen.
3. The system displays void reasons. Select a reason for voiding the line and press **OK**.
4. The item is voided. Depending on your system's configuration the original item is either marked grey or marked with a strike-through on the Sales Display Panel.

   The item is indicated as voided (characters turn red and price turns negative) on the Sales Display Panel and on the Customer Display.

Figure 6–5 Operator Display - Void Line

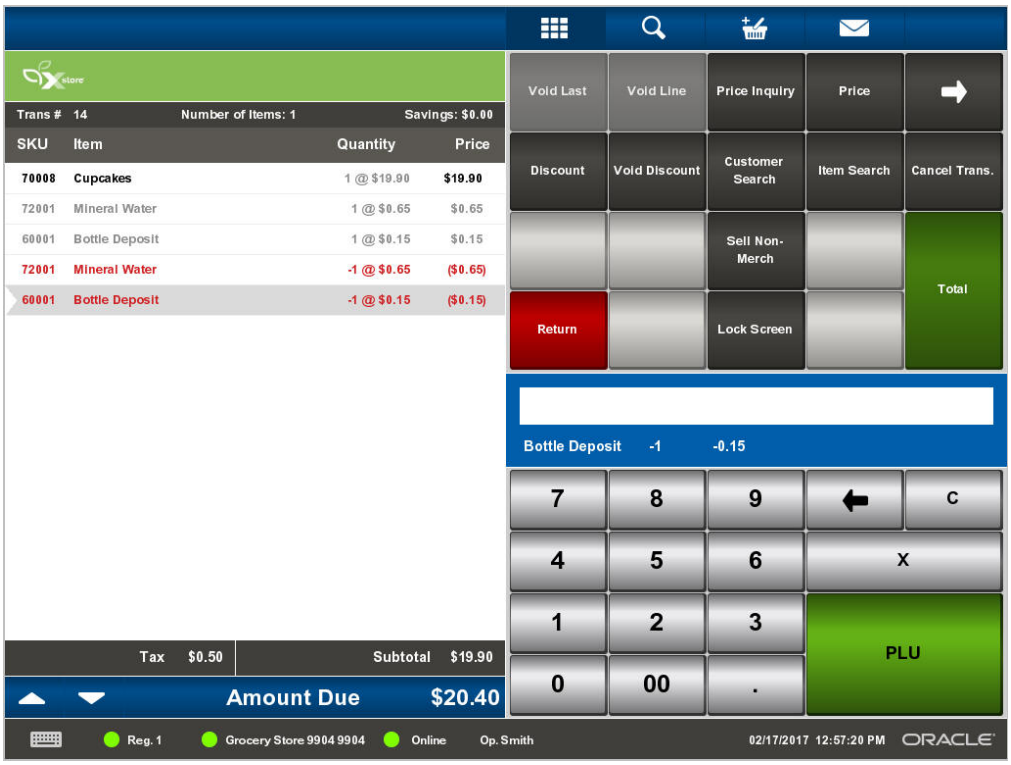
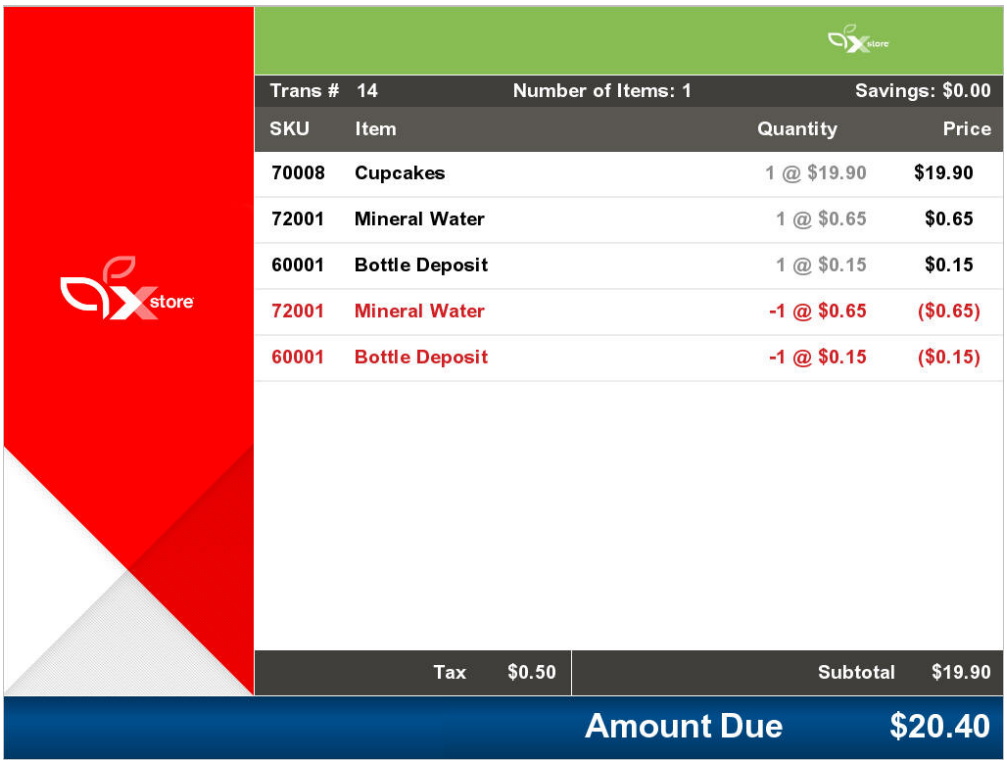


Figure 6–6 Customer Display - Void Line



Changing the Quantity of an Item

You can change the quantity of an item before you add the item to the sales transaction, or after you have added the item to the sale transaction.

Changing the Quantity While Entering the Item

To change the quantity of an item while adding the item to the sales transaction, follow the steps below.

1. Enter the desired quantity.
2. Press **X** on the numeric key pad.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

3. The system records the quantity. Scan, or enter the item as usual.
4. The item is shown on the Sales Display Panel and the Customer Display. Complete the sales transaction as usual.

Changing the Quantity after Entering the Item

You can change the quantity of an item after you have added the item to the sales transaction, when you are still in sales mode.

1. Enter the desired quantity.

2. Press **X** on the numeric key pad.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

3. Then select the item in the Sales Display Panel. The item line is marked grey.
4. You are prompted for the reason for the quantity override. Select a reason for the quantity override and press **OK**.
5. The original item is voided. The item is displayed on the Sales Display Panel and the Customer Display with the new quantity. Complete the sales transaction as usual.

Changing the Price of an Item

You can change the price of an item before you add the item to the sales transaction, or after you have added the item to the sales transaction.

Changing the Price Before Entering the Item

To change the price of an item before adding the item to the sales transaction, follow the steps below.

1. Enter the new item unit price.
2. Press **Price**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

3. Scan or enter an item.
4. You are prompted for a reason for the price override. Select a reason for the price override and press **OK**.
5. The item with the new item unit price is shown on the Sales Display Panel and the Customer Display. Complete the sales transaction as usual.

Changing the Price after Entering the Item

You can change the sales price of an item after you have added the item to the sales transaction, when you are still in sales mode.

1. Enter the item unit price.
2. Press **Price**.

> **Note:** If the entered price exceeds the configured maximum price, the system displays an error message.
>
> If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

3. Then select the item in the Sales Display Panel. The item line is marked grey.

> **Note:** You cannot change the sales price for weight and return items. Additionally, you cannot change the sales price if an item and/or attached item is configured with the flag price change not allowed.

4. You are prompted for a reason for the price override. Select a reason for the price override and press **OK**.
5. The original item is voided. The item is displayed on the Sales Display Panel and the Customer Display with the same quantity, but the new item unit price. Complete the sales transaction as usual.

Cancelling a Transaction

At any time before a sale or return has been tendered you can cancel the entire sales or return transaction.

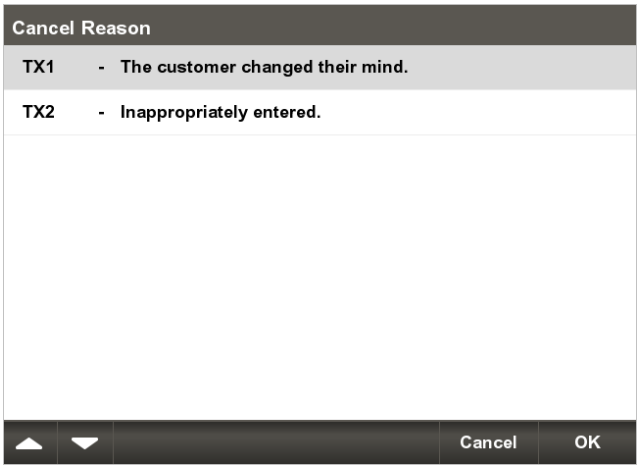
To cancel a transaction, follow the steps below.

1. Select the **Cancel Trans** menu button.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. You are prompted to enter a reason for cancelling the transaction. Select the corresponding reason and press **OK**.

Figure 6–7 Cancel Transaction - Reasons



3. The transaction is cancelled. If configured, a cancel transaction receipt is printed and the Sales screen is displayed.

Suspending/Resuming a Transaction

You can suspend or resume transactions in Xstore Point-of-Service, Lane Checkout User Interface.

Suspending a Transaction

After a transaction has been started, before tendering, you can suspend the current transaction.

1. Press the **Suspend** menu button.
2. The current transaction is suspended and a receipt with the note suspended is printed.

> **Note:** You can suspend several transactions, which can be resumed later at any register in the store.

Resuming a Transaction

After you have suspended a transaction, there are two different ways to resume a transaction.

Resuming a Transaction with Barcode

To resume a transaction with a barcode, follow the steps listed below.

1. If you are logged on to a register and no transaction has been started yet, scan the barcode generated during the suspend transaction function.
2. The register decodes the barcode and shows the suspended transaction.
3. After the transaction has been resumed, the register jumps into the Sales Tender screen. You can either continue adding items to the transaction or start the tendering process. In this state you can also suspend the transaction again.

Resuming a Transaction without Barcode

To resume a transaction without a barcode, follow the steps listed below.

1. If you are logged on to a register and no transaction has been started yet, press the **Resume** menu button. All suspended transactions are listed.
2. Select the corresponding transaction and press **OK**. The register returns to the Sales Tender screen. You can either continue adding items to the transaction or start the tendering process. In this state you can also suspend the transaction again.

> **Note:** If you already started a new transaction and you scan a suspended transaction receipt, the following message is shown:
>
> "Not allowed in a started transaction."
>
> If you scan an already resumed receipt again the following message is shown:
>
> "Barcode invalid - already resumed."
>
> It is also possible to resume transactions from other registers.

Adding Non-Merchandise Items to the Sale

The Xstore Point-of-Service, Lane Checkout User Interface also allows you to sell non-merchandise items.

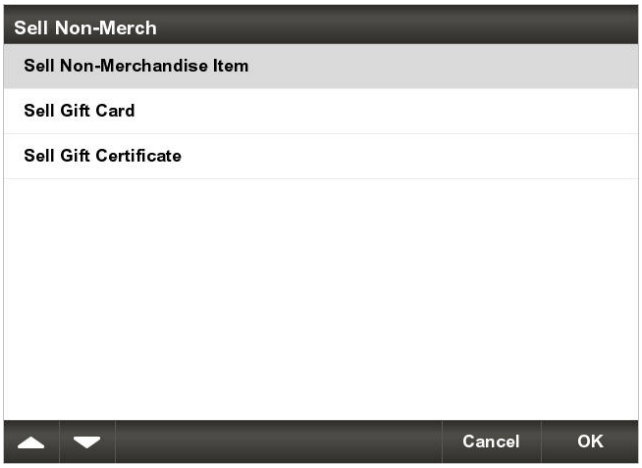
To sell a non-merchandise item, follow the steps below.

1. Press **Sell Non-Merch**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

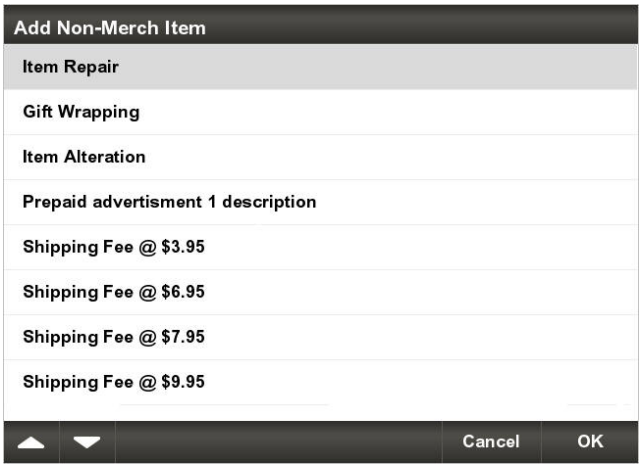
2. You are prompted to select the non-merch category. Select Sell Non-Merchandise Item and press **OK**.

Figure 6–8 Sell a Non-Merchandise Item



3. You are prompted to add a non-merch item from the list to the current sales transaction. Select an item from the list and press **OK**.

Figure 6–9 Add Non-Merchandise Item



4. The item description is displayed in the Focus Bar. If configured, you are prompted to enter the price.
5. Enter the price and press **Enter**.
   - If the selected item has a suggested price, accept or change the suggested price and press **Enter**.

6. The item is added to the Cart.

Figure 6–10 Operator Display - Non-Merchandise Item

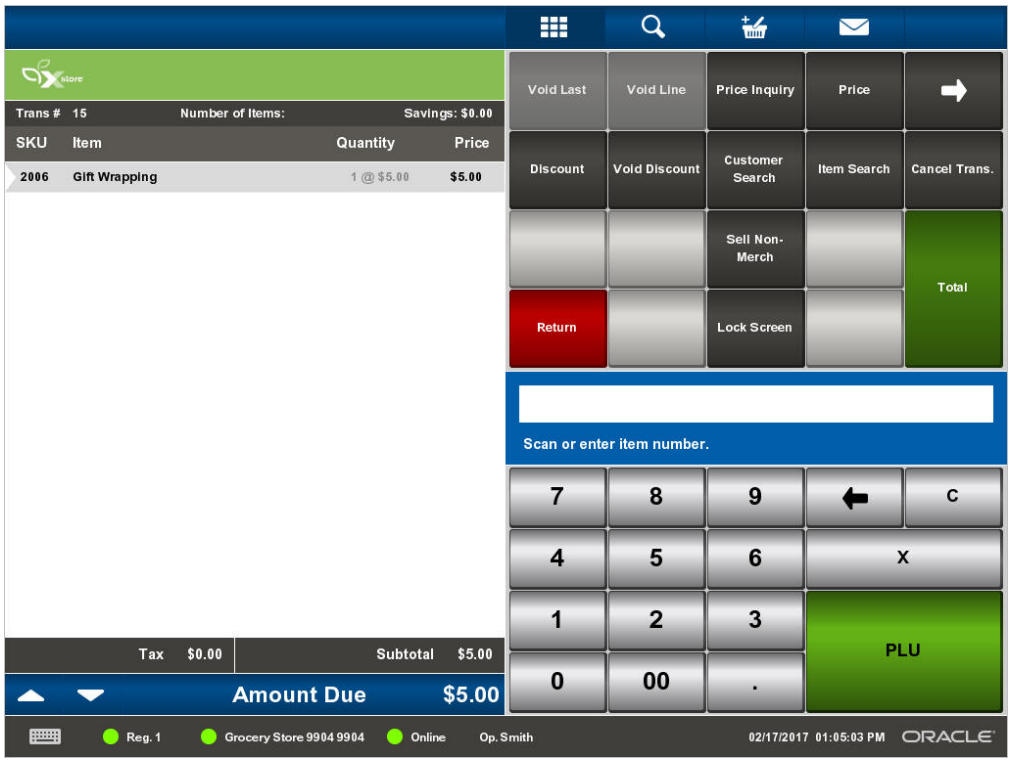
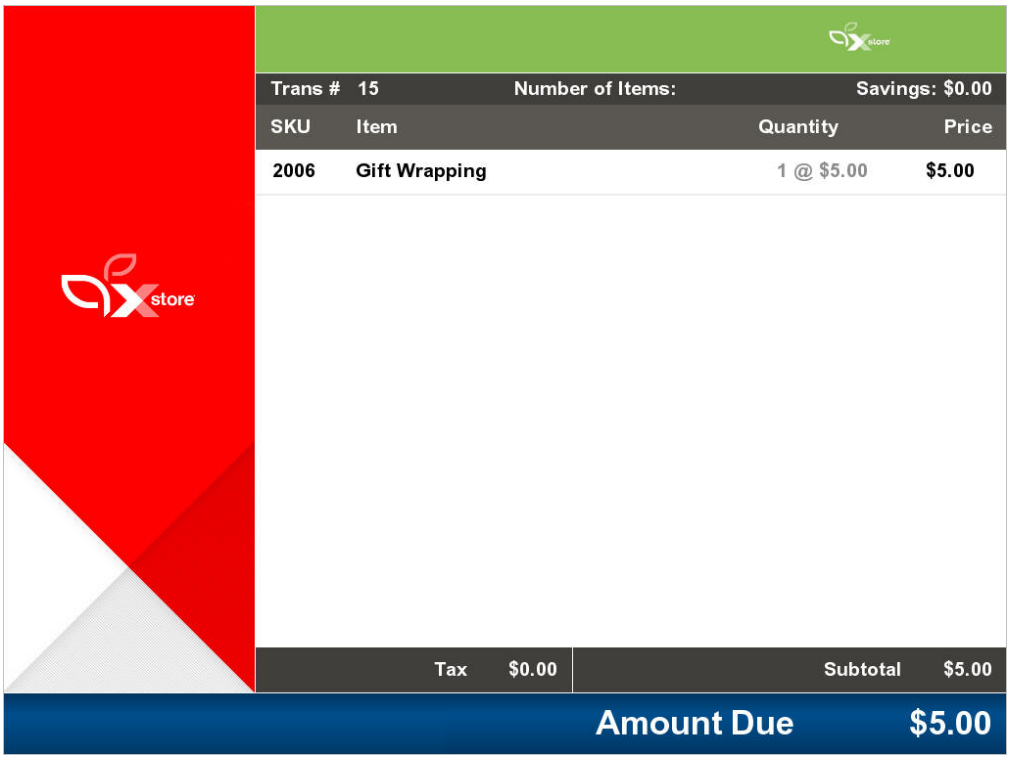


Figure 6–11 Customer Display - Non-Merchandise Item



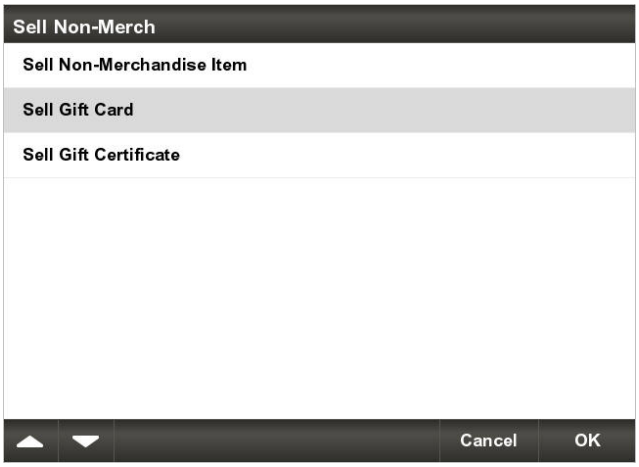
Adding Gift Cards to the Sale

To sell gift cards, follow the steps listed below.

1. Press **Sell Non-Merch**.
2. You are prompted to select the non-merchandise category. Select Sell Gift Card and press **OK**.

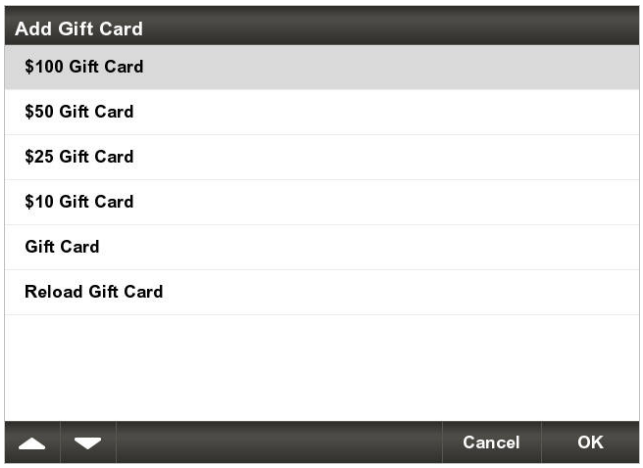
> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

Figure 6–12 Sell a Gift Card



3. You are prompted to add a gift card from the list to the current sales transaction. Select a gift card and press **OK**.

Figure 6–13 Add Gift Card



4. The gift card description is displayed in the Focus Bar. You are prompted to enter the gift card number.
5. Scan, or enter the gift card number and press **Enter**.

6. If no amount is associated with the gift card, you are prompted to enter the amount.
7. The gift card number is verified against the database. The system activates and authorizes the gift card.

> **Note:** If the gift card number was not found, or the system is offline, a corresponding message is displayed. Press **OK** to return to the Sales Screen.

8. The gift card is displayed on the Sales Panel and the Customer Display.

> **Note:** The gift card number is semi-hidden, only the last 4 digits are visible on the Sales Panel and Customer Display.

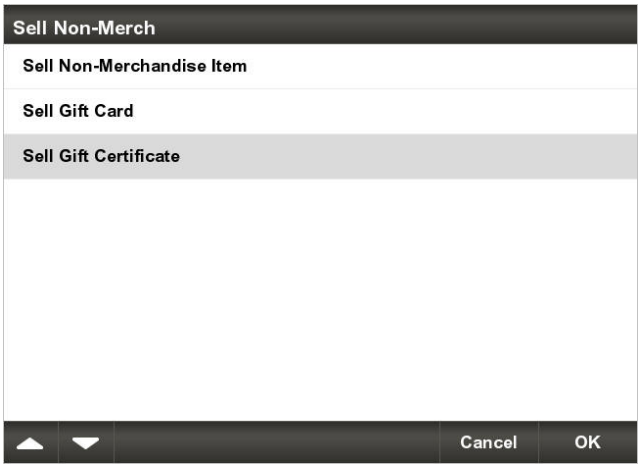
Adding Gift Certificates to the Sale

To sell gift certificates, follow the steps listed below.

1. Press **Sell Non-Merch**.
2. You are prompted to select the non-merchandise category. Select Sell Gift Certificate and press **OK**.

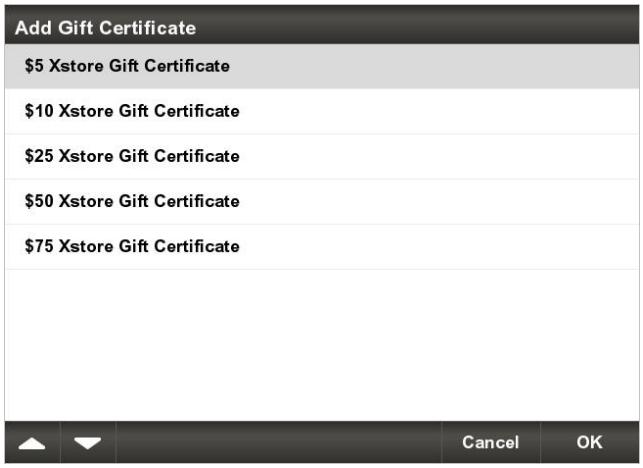
> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

Figure 6–14 Sell a Gift Certificate



3. You are prompted to add a gift certificate from the list to the current sales transaction. Select a gift card and press **OK**.

Figure 6–15 Add Gift Certificate



4. If no amount is associated with the gift certificate, you are prompted to enter the amount.
5. The gift certificate is displayed on the Sales Panel and the Customer Display.

Note: The gift certificate number is semi-hidden, only the last 4 digits are visible on the Sales Panel and Customer Display.

7

Discounts and Deals

This chapter describes discounts and deals. You can apply a discount to a single line item, multiple line items, or entire transactions. You can also apply an award discount to the transaction.

Transaction-level discounts are applied in the same manner as a line item discount. A transaction discount is applied equally to each eligible item in the transaction and a line item discount is applied to a single item. Discounts may be specified as either amounts (for example, $5.00 off) or percentages (for example, 10% off) for both item and transaction discounts.

Adding a Discount to an Item

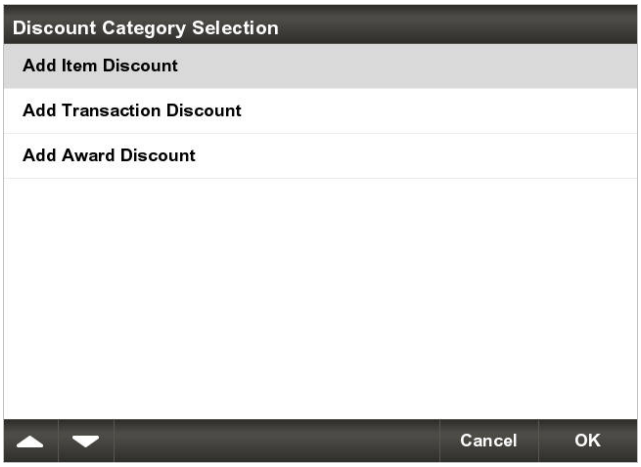
You can only add an item discount to the last entered item in the Sales screen. To add an item discount, follow the steps outlined below.

1. Press **Discount** in the Sales screen.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the"Override" section in Chapter 1.

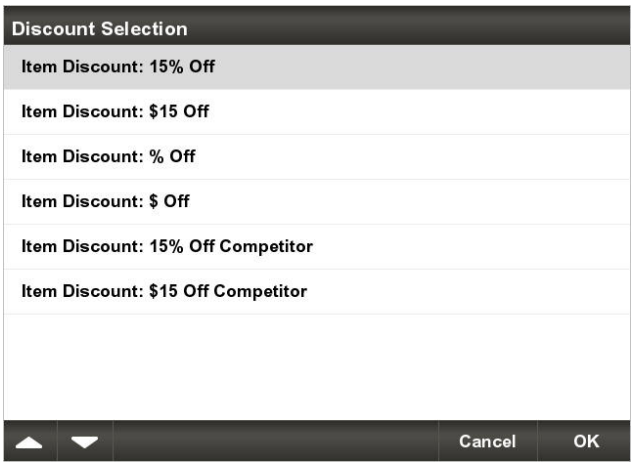
2. You are prompted to select a discount category. Select Add Item Discount and press **OK**.

Figure 7–1 Discount Category Selection



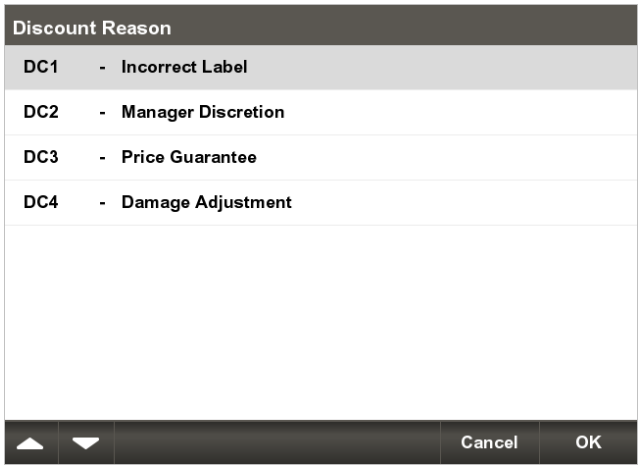
3. You are prompted to select an item discount. Select an item discount and press **OK**.

Figure 7–2 Discount Selection



4. Depending on the item discount, you may be prompted for the discount amount, the percentage of the discount or the competitive price. Enter the requested input and press **Enter**.
5. You are prompted to select a reason code for applying the item discount. Select the corresponding reason and press **OK**.

Figure 7–3 Discount Reasons



6. The applied item discount (blue characters and negative price) is shown on the Sales Display Panel and on the Customer Display.

Figure 7–4 Operator Display - Applied Item Discount

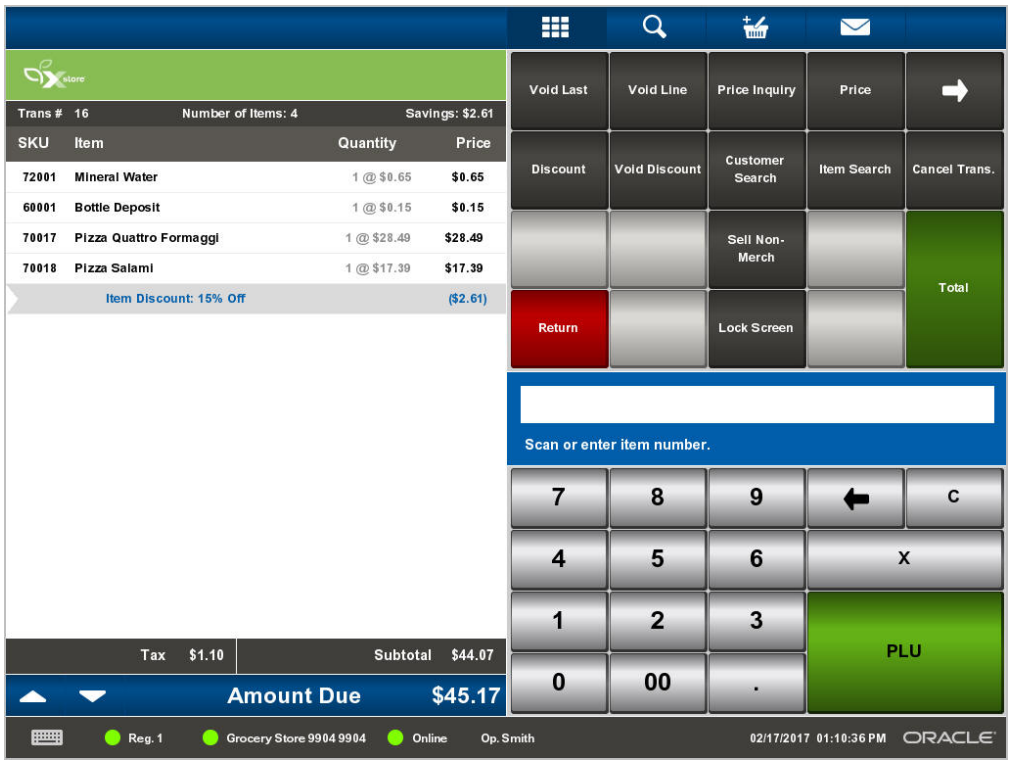
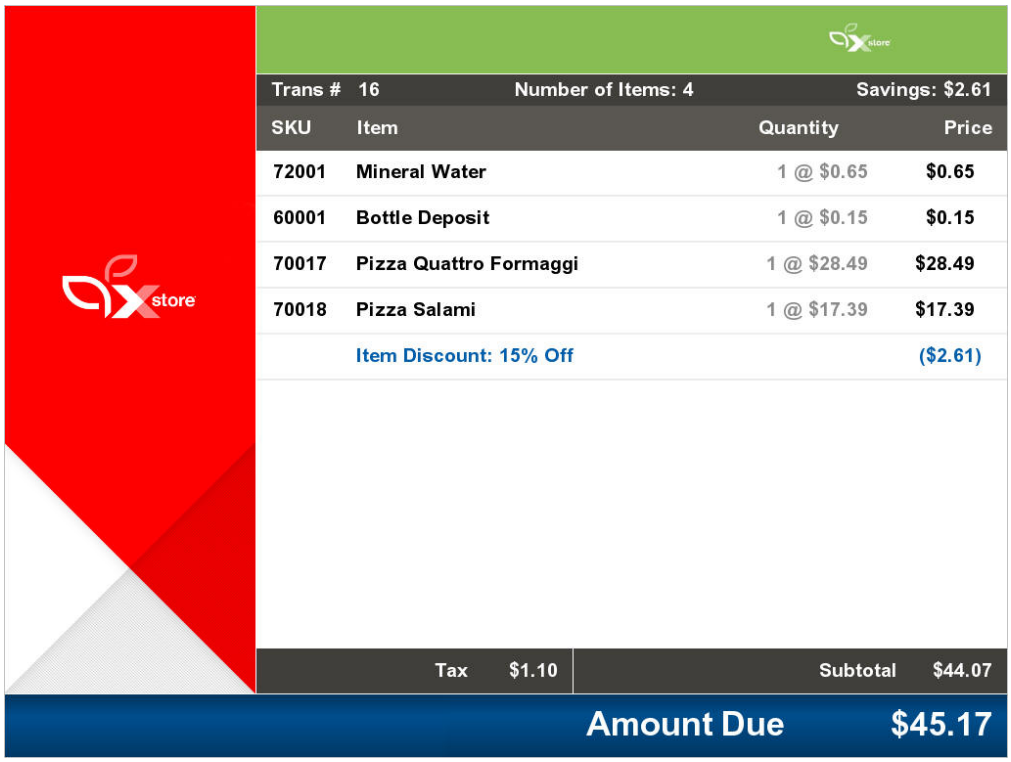


Figure 7–5 Customer Display - Applied Item Discount



Adding a Transaction Discount

You can also add transaction discounts in the Xstore Point-of-Service, Lane Checkout User Interface. To add a transaction discount, follow the steps below.

1. Select **Discount** in the Sales Tender screen.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. You are prompted to select a discount category. Select Add Transaction Discount and press **OK**.
3. You are prompted to select a transaction discount. Select a transaction discount and press **OK**.
4. Depending on the transaction discount, you may be prompted for the discount amount or the percentage of the discount. Enter the requested input and press **Enter**.
5. You are prompted to select a reason for applying the transaction discount. Select the corresponding reason and press **OK**.
6. The applied transaction discount is shown on the Sales Display Panel and on the Customer Display. Complete the sale transaction as usual.

Figure 7–6 Operator Display - Applied Transaction Discount

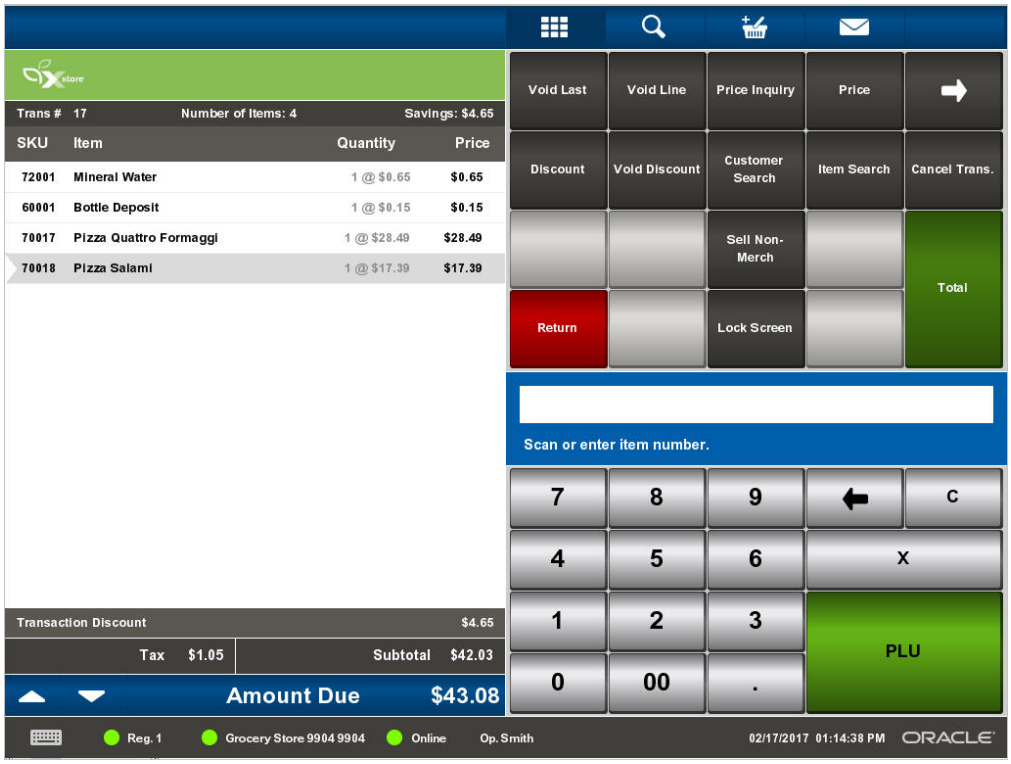
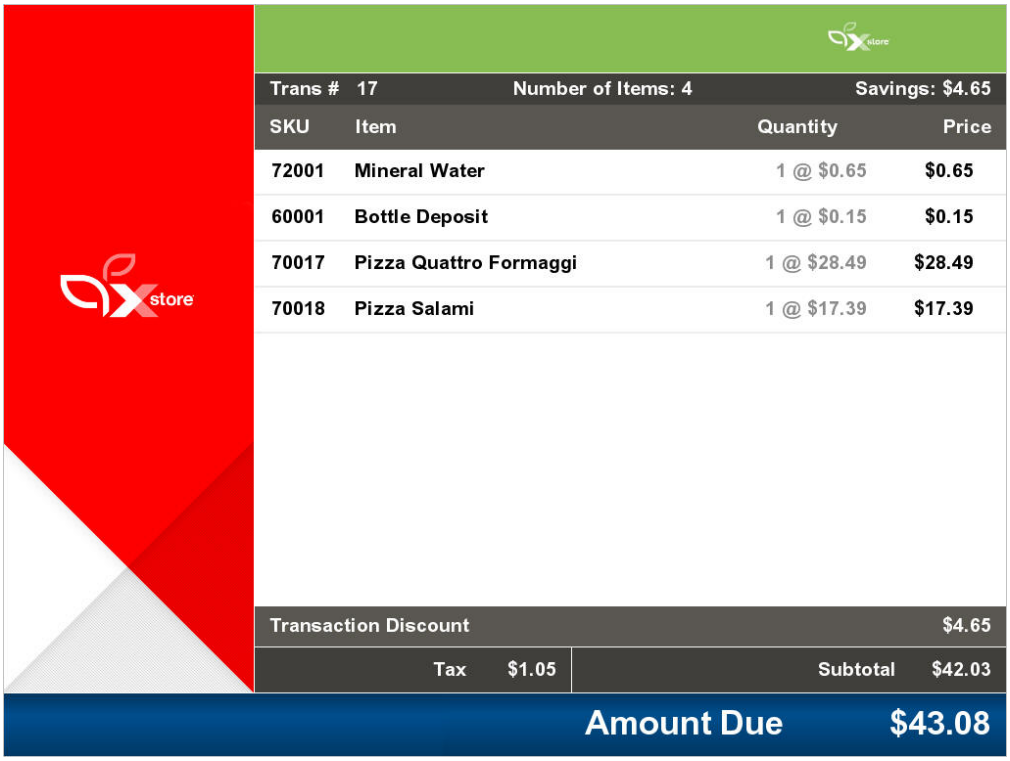


Figure 7–7 Customer Display - Applied Transaction Discount



Adding an Award Discount

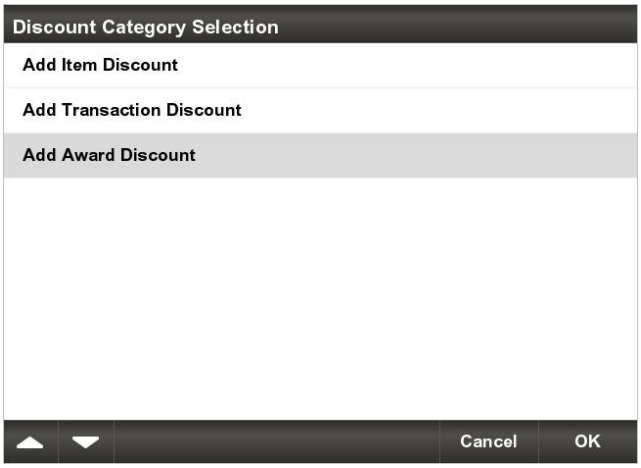
The Xstore Point-of-Service, Lane Checkout User Interface allows you to add customer awards to a transaction as a discount, so that the customer can redeem her/his awards. To add an award discount to the transaction, follow the steps below.

1. Select **Discount** in the Sales screen.

> **Note:** To add an award discount, a customer must be linked to the transaction and at least one item must be entered.

2. You are prompted to select a discount category. Select Add Award Discount and press **OK**.

Figure 7–8 Discount Category Selection



3. If the customer has multiple associated loyalty accounts, you are prompted to select one loyalty account for the current sales transaction.

> **Note:** The system displays the card numbers, loyalty and awards balance. You can only associate one loyalty account with the current transaction.

4. You are prompted to enter the award amount. The maximum allowed award amount is displayed in the Focus Bar.
5. Enter the award amount and press **Enter**.

> **Note:** If the entered amount exceeds the subtotal amount or the award amount, the system displays corresponding error messages.

6. The applied award discount (blue characters and negative price) is shown on the Sales Display Panel and on the Customer Display. Also the new award balance is displayed in the Customer Awards Bar.

Figure 7–9 Operator Display - Redeemed Awards Discount

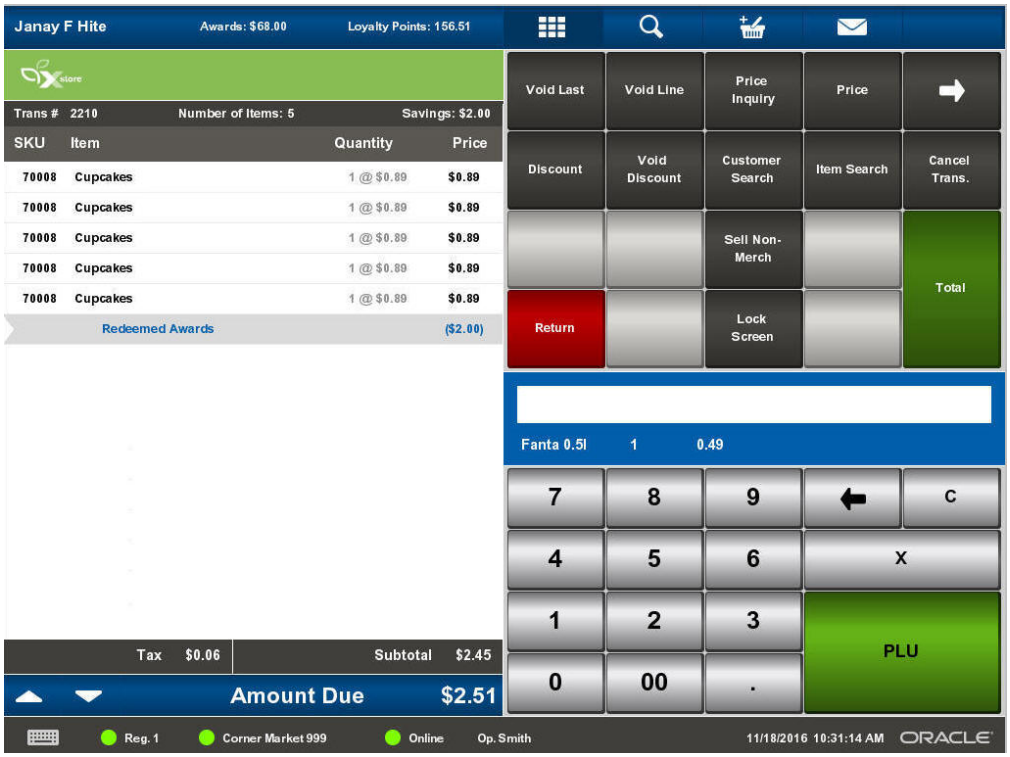
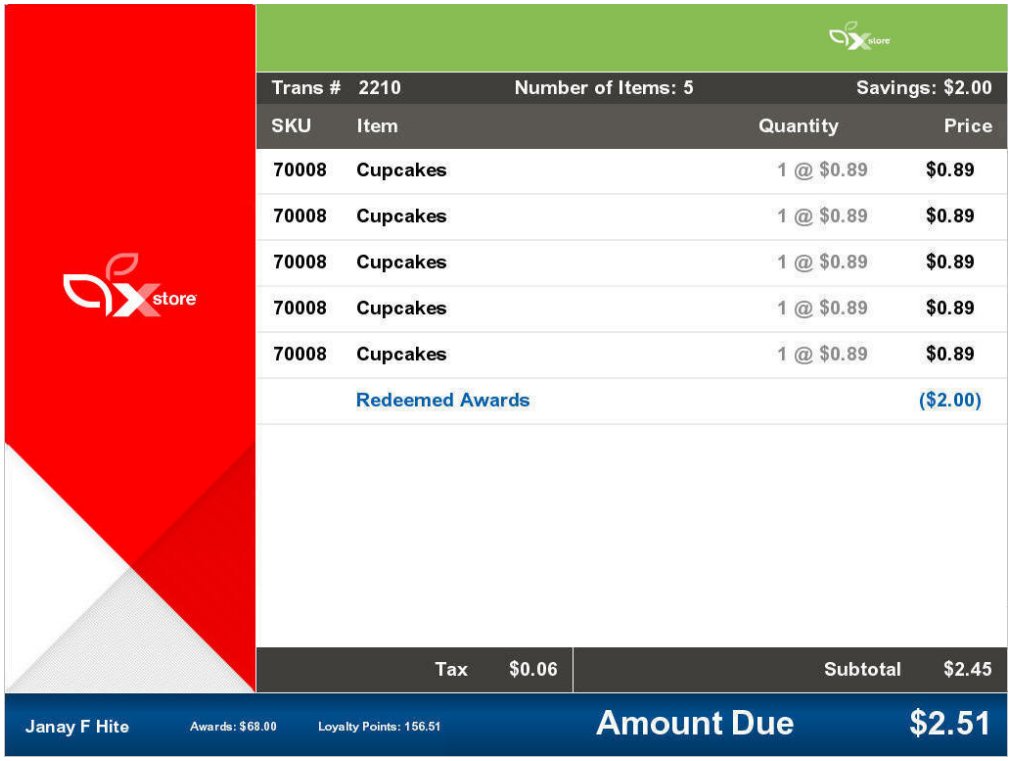


Figure 7–10 Customer Display - Redeemed Awards Item Discount



Voiding a Discount

You can void a discount in the Xstore Point-of-Service, Lane Checkout User Interface. To void a discount, return to the Sales screen.

> **Note:** If you are already in the Sales Tender screen before applying a tender, press **C** (Clear) to return to the Sales screen.

To void an applied discount follow the steps outlined below.

1. Select **Void Discount**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. You are prompted for the discount you would like to void. Select the corresponding discount and press **OK**.
3. The selected discount is voided, as shown on the Sales Display Panel and the Customer Display.

Deals

Deal pricing discounts are automatically applied to items that have been scanned. No user interaction is required to apply a deal to a transaction. Once the "trigger" items are added, the system applies the corresponding discount. There are many variations of deal discounts, for example, buy three alcoholic beverages get 10% Off. The deals are displayed on the Operator and Customer Display.

Figure 7–11 Operator Display - Deals

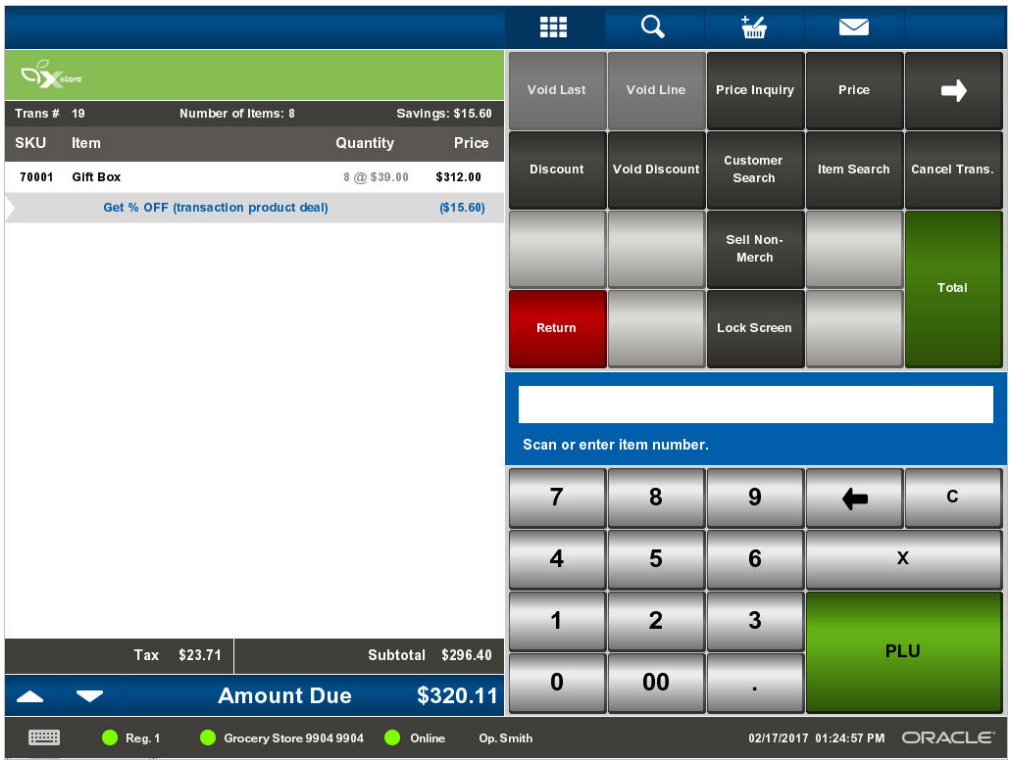
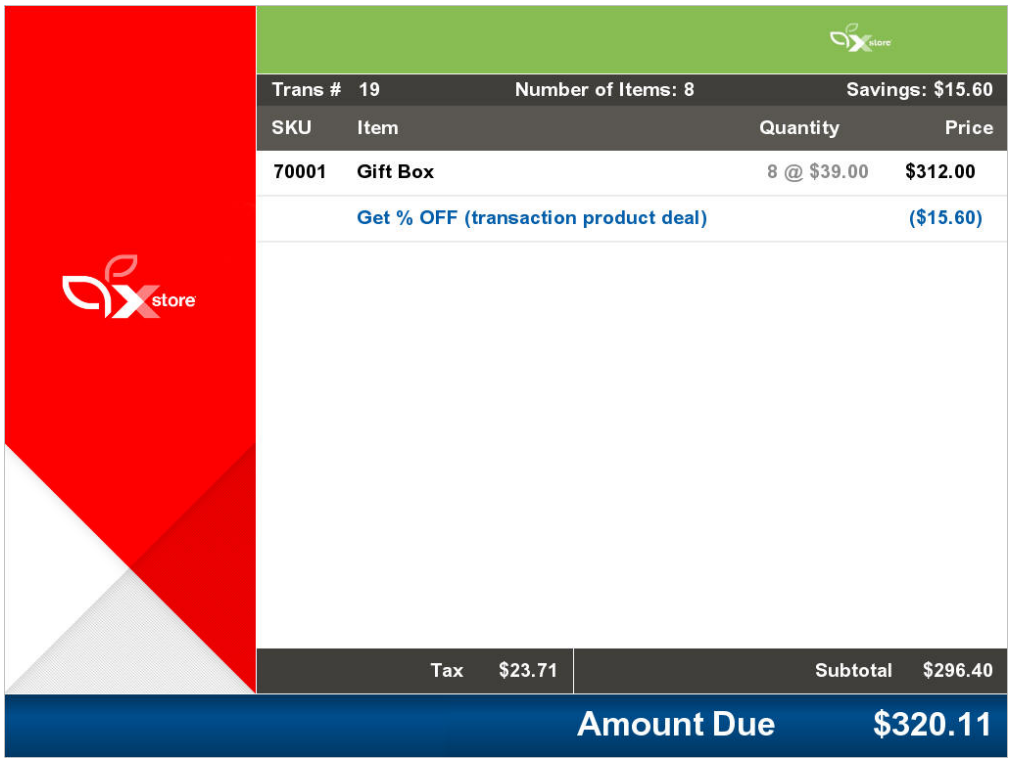


Figure 7–12 Customer Display - Deals



Total Savings

Total savings, all discounts and deals, for a sales transaction are shown in the field Savings on the Sales Display and on the Customer Display.

8

Miscellaneous Functions

This chapter explains the following miscellaneous functions:

- Age Verification
- Cashier Age Restrictions
- Price Inquiry
- Sales Ban
- Recalling an Item
- Purchase Limit
- Quantity Query
- Price Query
- Verifying a Price Tag
- Serial Number
- Post Void Transaction
- Reprinting the Last Receipt
- Reprinting a Receipt
- Store Message
- Training Mode
- Opening the Browser
- Locking the Register
- Prompting for a Price
- Restricting Receipts
- Inventory Adjustment
- Clock In/Clock Out
- Closing the Application

Age Verification

The Xstore Point-of-Service, Lane Checkout User Interface allows you to configure customer age verifications to determine whether a customer meets the age requirements to buy certain items. You can set different age levels for verification (for

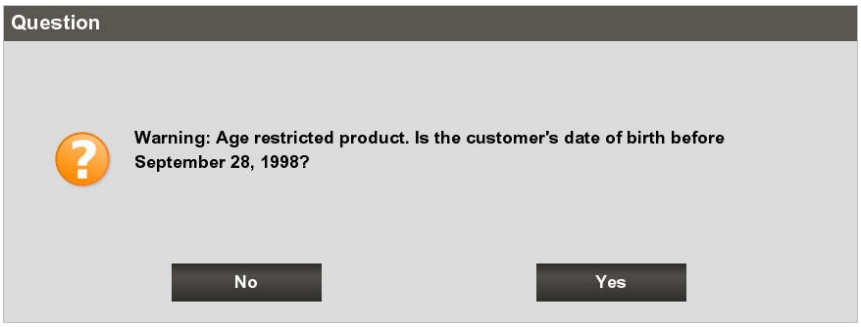
example, 18 years and 21 years) in the Xstore Point-of-Service, Lane Checkout User Interface.

An additional age verification is only requested, if an item with a higher restriction is added to the transaction. For example, if the first purchased item has an age limit of 21 and the second item has an age limit of 18, there is only an age verification for the first item, but not for the second one.

To sell an item with an age verification, follow the steps below.

1. Enter an item where an age verification is necessary. The Xstore Point-of-Service, Lane Checkout User Interface displays the following prompt.

Figure 8–1 Age Verification



- Select **Yes** to confirm the prompt. The item is shown on the Sales Display Panel. For additional items requiring an age verification 18 years, no prompt is displayed.
- Select **No**. The item is not added to the Cart. If additional items with an age verification are entered, the prompt is shown again.

Cashier Age Restrictions

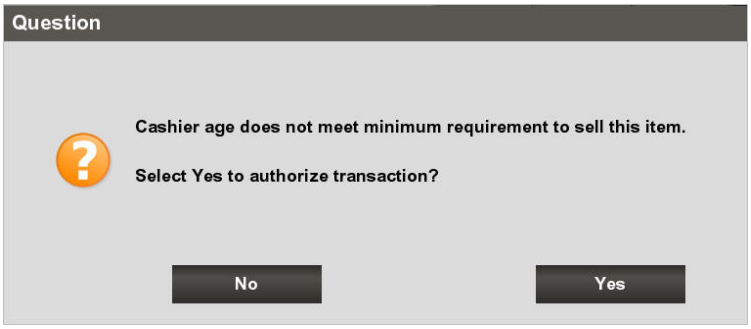
The Xstore Point-of-Service, Lane Checkout User Interface allows you to configure cashier age restrictions to determine whether a cashier has the permission to sell certain items. You can activate/deactivate the cashier age restriction per store.

An additional age verification is only requested if an item with a higher restriction is added to the transaction. For example, if the first purchased item has an age limit of 21 and the second item has an age limit of 18, there is only an age verification for the first item, but not for the second one.

If the cashier age restriction is activated and there is no date of birth entered for the cashier, the system displays the cashier age restriction prompt.

1. Enter an item with a cashier age restriction. Xstore Point-of-Service, Lane Checkout User Interface displays the following prompt.

Figure 8–2 Cashier Age Restriction



2. Select **Yes** to authorize the transaction.
   - Select **No**. The item is not added to the sale transaction.
3. Users holding the required security privileges must follow the steps below to carry out the security override.
   a. Enter your user name and press **Enter**.
   b. Enter your password and press **Enter**.
4. The item is added to the sales transaction and shown on the Sales Display Panel.

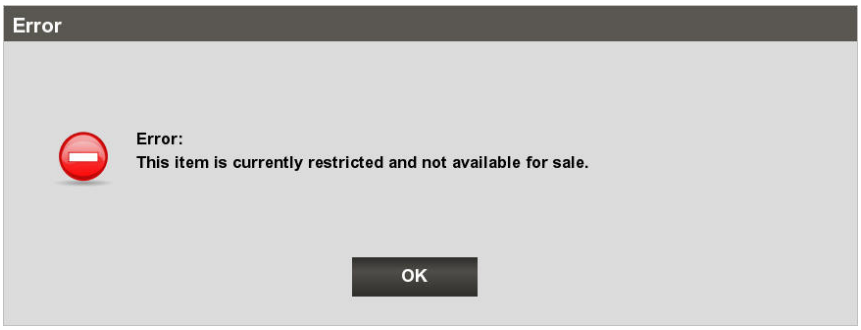
Time Restrictions

The Xstore Point-of-Service, Lane Checkout User Interface allows you to configure a time frame in which certain items cannot be sold and/or returned, for example, alcohol. If this function is enabled, items with a restricted time frame can only be sold during authorized hours and days. You can activate/deactivate the time frame restriction by item, department and sub-department.

To sell an item with a time restriction, follow the steps below.

1. Enter an item with a restricted time frame.
2. Xstore Point-of-Service, Lane Checkout User Interface validates the system time and day against the configured restricted time frame.
3. The system displays the prompt, that the item is currently restricted and not available for sale.

Figure 8–3 Restricted Time Frame



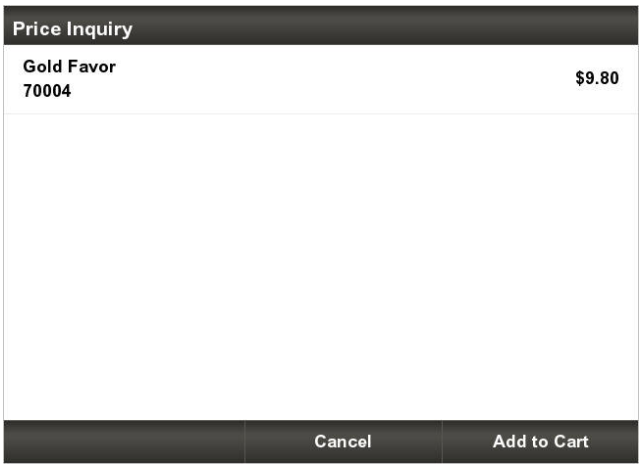
4. Press **OK** to close the prompt.

Price Inquiry

If you want to look up the price of an item, use the function Price Inquiry. You can look up the price for an item when you are logged out as well as when you are logged on to the application. To look up the price of an item, follow the steps below.

1. Press **Price Inquiry**.
2. Your are prompted for the item. Scan, or enter the item and press **Enter**.
3. The item description, item ID and the corresponding price are displayed.

Figure 8–4 Price Inquiry - Logged In

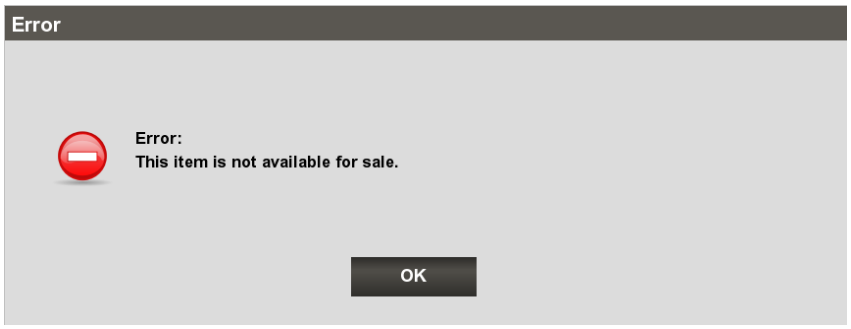


4. If you are logged out of the application, press **OK** to close the window.
5. If you are logged on to the application, choose one of the following options.
   - Press **Cancel** to return to the Sales screen.
   - Press **Add to Cart** to add the item to the current sales transaction. The item is shown on the Sales Display Panel and Customer Display.

Sales Ban

You can flag an item with a sales ban. If you enter the banned item, the system displays the following prompt.

Figure 8–5 Sales Ban

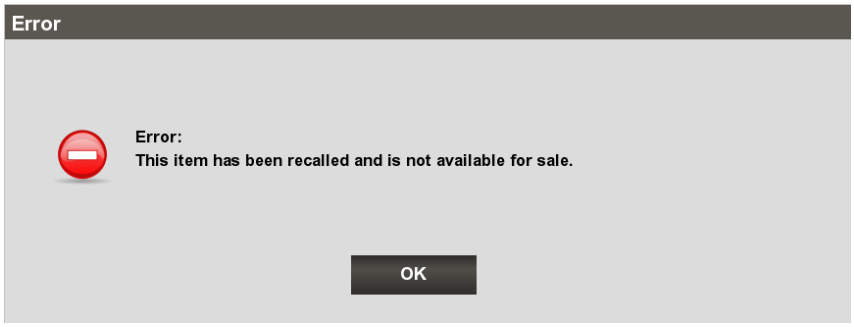


Note: Sales bans are not restricted to the item (PLU price look up code) itself (PLU), but could include reasons such as batch recall or expired items etc. The system identifies such items through the barcode (GS1 databar barcode field AIs Application Identifiers).

Recalling an Item

If an item is recalled by the manufacturer, items can be flagged accordingly. If you enter an item marked for recall, the system displays the following prompt.

Figure 8–6 Recall



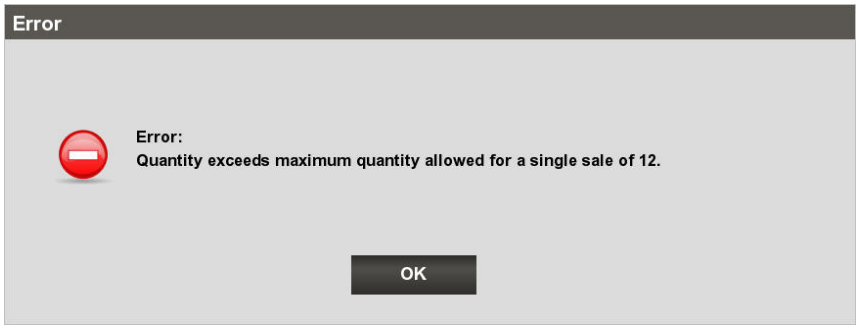
Purchase Limit

You can flag an item with a purchase limit in the Xstore Point-of-Service, Lane Checkout User Interface.

Maximum Purchase Limit

If you enter an item flagged with a maximum quantity, the system displays the following prompt.

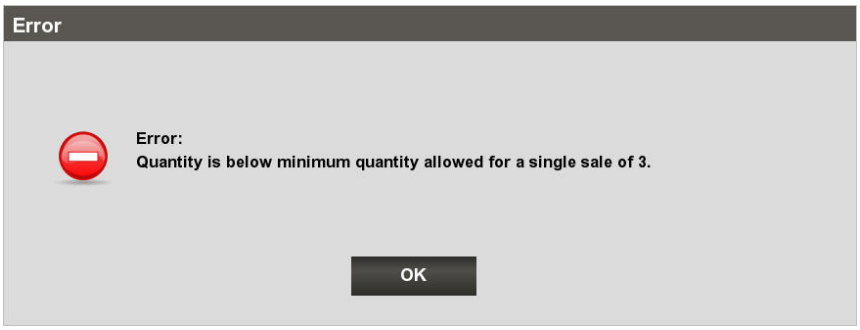
Figure 8–7 Maximum Purchase Limit



Minimum Purchase Limit

If you enter an item flagged with a minimum quantity, the system displays the following prompt.

Figure 8–8 Minimum Purchase Limit



Quantity Query

You can flag an item with a quantity query in the Xstore Point-of-Service, Lane Checkout User Interface.

1. If you enter an item flagged with a quantity query, the system prompts for the quantity.
2. Enter the desired quantity and press **Enter**.
3. The item is shown on the Sales Display Panel.

Price Query

You can flag an item with a price query in the Xstore Point-of-Service, Lane Checkout User Interface.

1. If you enter an item flagged with a price query, the system prompts for the price.
2. Leave the suggested price or enter a new price. Press **Enter**.
3. The item is shown in the Sales Display Panel and the Customer Display.

Verifying a Price Tag

The Xstore Point-of-Service, Lane Checkout User Interface provides the possibility to flag an item with a price tag verification.

If you enter the flagged item, you are asked to verify the shown price.

- If the price is correct, press **Enter**.
- If the price is not correct, enter the new price and press **Enter**.

Serial Number

You can flag an item with a query for the serial number.

1. Enter the corresponding item. You are prompted for the serial number.
2. Enter the serial number and press **Enter**. The serial number is shown on the Sales Display Panel.
3. Complete the transaction as usual. The serial number is printed on the receipt.

Post Void Transaction

Performing a Post Void transaction changes the status of a sales transaction to void. All records in the system are reset, as if they had never occurred during the original transaction. For example, a post void adjusts the tender totals for the till involved in the transaction. A transaction may be post voided only on the day it is created. Post Voids may be performed on a different register from the one where the original transaction was executed.

1. To carry out a post void transaction, press the **Post Void** menu button

   Note: If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. You are prompted for the receipt number. Scan, or enter the receipt number and press **Enter**.
   a. If you scanned the receipt, you are asked if you really want to void the selected transaction. Press **Yes** to void the scanned receipt.

   Note: If you scanned the receipt, steps 3-4 are omitted.

3. You are prompted for the original transaction date. Enter the date and press **Enter**.
4. You are prompted for the register number. Enter the register number and press **Enter**.
5. You are prompted for the amount. Enter the corresponding amount and press **Enter**.
6. You are prompted for the void reason. Select the reason for the post void transaction and press **OK**.
7. The system voids the transaction and prints a void receipt for your record.

   Note: All sold items, discounts, and deals are reversed. All written statistic values are reversed as well. The original receipt can only be voided once.

   a. If you void a Credit Card receipt, the information for reversing the authorization is displayed.
   b. If the process has been successful, the system shows a corresponding prompt. Close the prompt with **OK**.

Reprinting the Last Receipt

You can reprint the last receipt of the current register in Xstore Point-of-Service, Lane Checkout User Interface.

1. Press **Reprint Last Receipt**.
2. The system prints the last receipt and the receipt is marked as reprint.

Reprinting a Receipt

You can also reprint a receipt of any register in Xstore Point-of-Service, Lane Checkout User Interface.

1. Press **Reprint Receipt**.
2. The register prompts for the receipt number. Enter the receipt number and press **Enter**.
3. The register prompts for the register number. Enter the register number and press **Enter**.
4. The system prints the requested receipt. The receipt is marked as reprint.

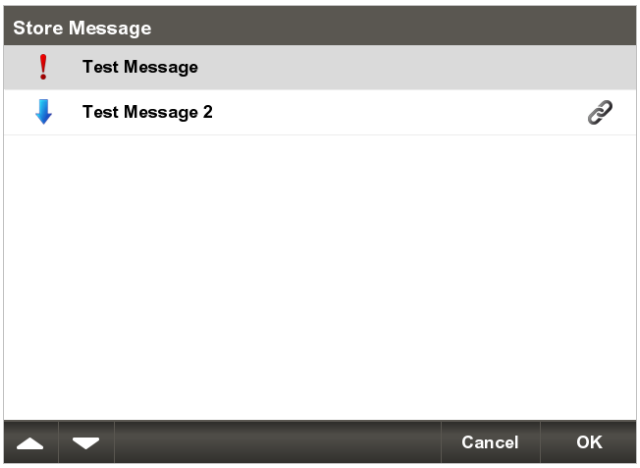
Note: You can reprint any receipt from the current business day.

Store Message

Store messages, created in the back office, can be viewed in the Xstore Point-of-Service, Lane Checkout User Interface. If you start the cash register, the store messages are displayed. You can also use the envelope icon in the Sales screen to view store messages. The number of available store messages is shown right next to the envelope icon.

1. Select the Store Message icon in the Tab Menu.
2. The available store messages are displayed.

Figure 8–9 Store Message



3. View the messages. Exit the messages with **OK** or **Cancel**.

Note: The store messages are available for as long as defined in the back office. For more information on Store Messages - see the *Oracle Retail Xstore Point-of-Service Manager's Guide* and *Oracle Retail Xstore Office User Guide*.

Table 8–1 states possible Store Message icons and their meaning.

Table 8–1 Store Message Icons

Icon	Description
	The icon indicates that the message contains a link (URL). To open the link: ■ Select the message with the up and down arrows and press **OK**, or open the link with a touch on the message. If your register is configured to include a keyboard: ■ Select the message with the up and down arrows. ■ Select **Enter** to open the link.
	This icon indicates high priority.
None	No icon indicates a medium priority.
	This icon indicates low priority.

Training Mode

The Xstore Point-of-Service, Lane Checkout User Interface provides the possibility to train your staff in training mode.

Entering the Training Mode

To enter the Training Mode follow the steps below:

1. Press **Training Mode** to start the Xstore Point-of-Service, Lane Checkout User Interface training. The Training Mode is indicated with the information Training Mode on the Operator as well as the Customer Display.

Figure 8–10 Training Mode

Note: All created receipts are also marked with training mode.

Exiting the Training Mode

To exit the Training Mode follow the steps below.

1. Press **Exit Training Mode**.
2. The system prints the receipt Exit Training Mode.

Opening the Browser

If you select the menu button **Open Browser**, the browser window opens. To exit the browser window, click on the Exit icon in the top right hand corner.

Locking the Register

You can lock the cash register temporarily.

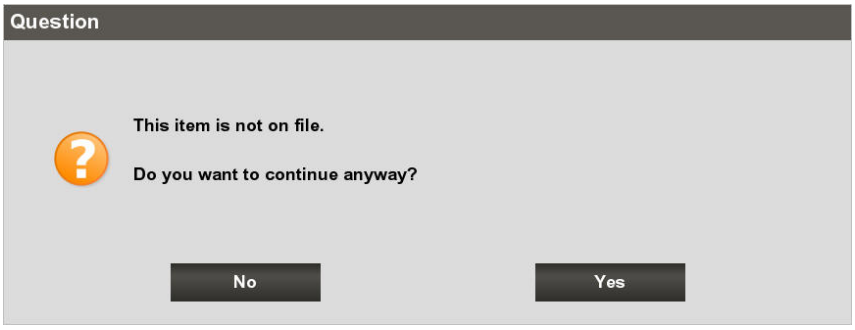
- To lock the cash register temporarily, press the **Lock Screen** menu button.
- To log on again enter your password and press **Enter**.

Prompting for a Price

The Xstore Point-of-Service, Lane Checkout User Interface allows you to configure the ability to sell items that are not found in the system. To add an item to a sale transaction that is not found in the system, follow the steps below.

1. Enter an item that is not on file.
2. You are prompted if you want to sell the item not on file.

Figure 8–11 Item Not on File



3. Select **Yes** to confirm the prompt and continue to sell the item.

   Note: If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

   - Select **No** to cancel the item.
4. You are prompted for the item description. Enter the item description and confirm with **Enter**.
5. You are prompted for the item price. Enter the item price and confirm with **Enter.**
6. You are prompted for the item department. Enter the department and confirm with **Enter**.
7. The item is added to the sale transaction. The Xstore Point-of-Service, Lane Checkout User Interface displays the item on the Sale Display Panel and on the Customer Display.

Restricting Receipts

The Xstore Point-of-Service, Lane Checkout User Interface allows you to restrict receipts for specific functions, for example, no receipt is printed when you are in training mode.

For more information about system configurations, see the *Oracle Retail Xstore Office User Guide*.

Inventory Adjustment

The Xstore Point-of-Service, Lane Checkout User Interface allows you to write-off items you can no longer sell, for example broken items. To make an inventory adjustment, follow the steps below.

1. Press **Inventory Adjustment**.

   Note: Depending on your system's configuration, you may be prompted for a reason code, additional comments, a location and a bucket ID.

   If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. You are prompted for the reason for the inventory adjustment. Select a reason from the list and press **OK**.

   Note: If only one reason is configured, this reason is selected automatically.

3. You are prompted for additional comments. Enter comments, if necessary, and press **OK**.
4. You are prompted for a location. Select a location from the list and press **OK**.

   Note: If only one location is configured, this location is selected automatically.

5. You are prompted for a bucket ID. Select a bucket ID from the list and press **OK**.

   Note: If only one bucket ID is configured, this bucket ID is selected automatically.

6. The system returns to the Inventory Adjustment screen with the Inventory Adjustment transaction still in progress.
7. You are prompted to scan or enter the item number for the inventory adjustment. You can enter several items for the inventory adjustment.

   Additionally, you can change the quantity for the selected items. For more information about how to change the quantity of an item, see the "Changing the Quantity after Entering the Item" section in Chapter 6.

8. Press **Complete** to complete the Inventory Adjustment transaction and print a receipt.

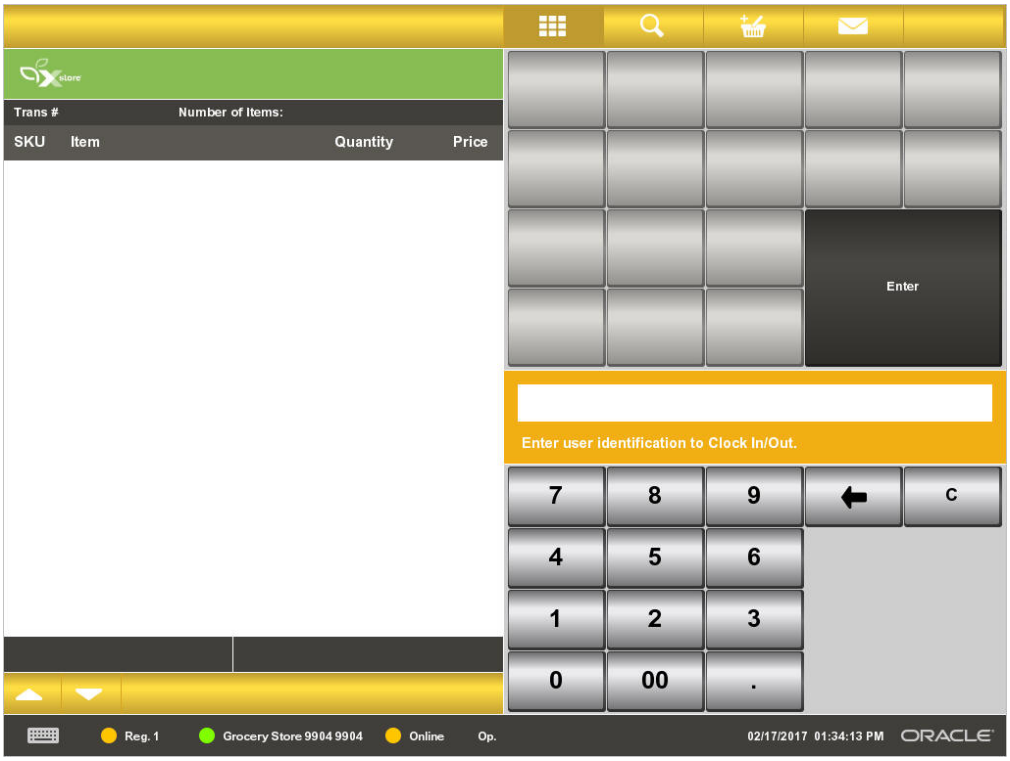
Clock In/Clock Out

The Clock In/Clock Out function is only available when the register is closed.

For more information about how to close the register, see the "Closing the Register" section in Chapter 12.

1. Press **Clock In/Out**.
2. The screen turns yellow to indicate that you are in the clock in/out mode.

Figure 8–12 Clock In/Out

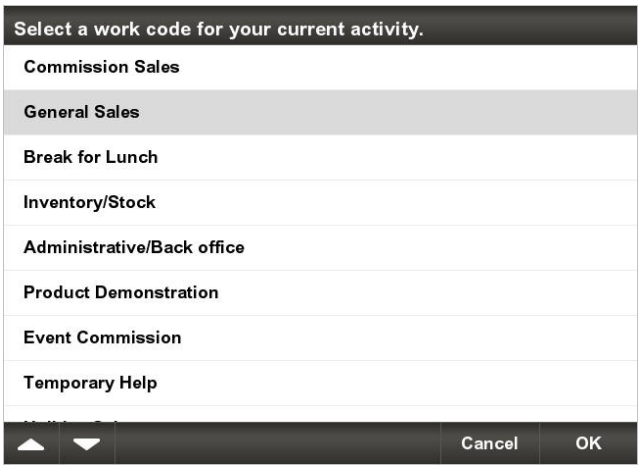


3. You are prompted for your user ID. Enter your user ID and press **Enter**.

> **Note:** The system verifies the employee ID. If the ID cannot be verified an error message is displayed.

4. You are prompted for your password. Enter your password and press **Enter**.
5. You are prompted for a work code for your current activity. Select a work code and press **OK**.

Figure 8–13 Work Codes



Note: If you are already logged in with the selected work code, you are prompted whether to clock out or to clock in with a different work code.

If you try to clock in/out before the configured time for a specific work code, the system returns an error message. Users holding the required security privileges must carry out the security override. For more information about the security override, see the "Override"section in Chapter 1.

6. You are clocked out/in. The system prints a corresponding receipt.

Closing the Application

To close the Xstore Point-of-Service, Lane Checkout User Interface, follow the steps below.

1. Enter 99 and press **Code**.

Note: In the Xstore Point-of-Service, Lane Checkout User Interface you can configure, who can close the application.

If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. The application is closed.

9

Return Transactions

Returns allow you to create transactions for returned items and to associate the reason the item was returned with to the transaction. The Xstore Point-of-Service, Lane Checkout User Interface allows you to create return transactions with or without the original receipt and within a transaction. If you are in the Return mode, the Operator and Customer Display turn red.

Returning Items without Original Receipt - Unverified Return

An unverified return is a return without a receipt. To carry out an unverified return, follow the steps below.

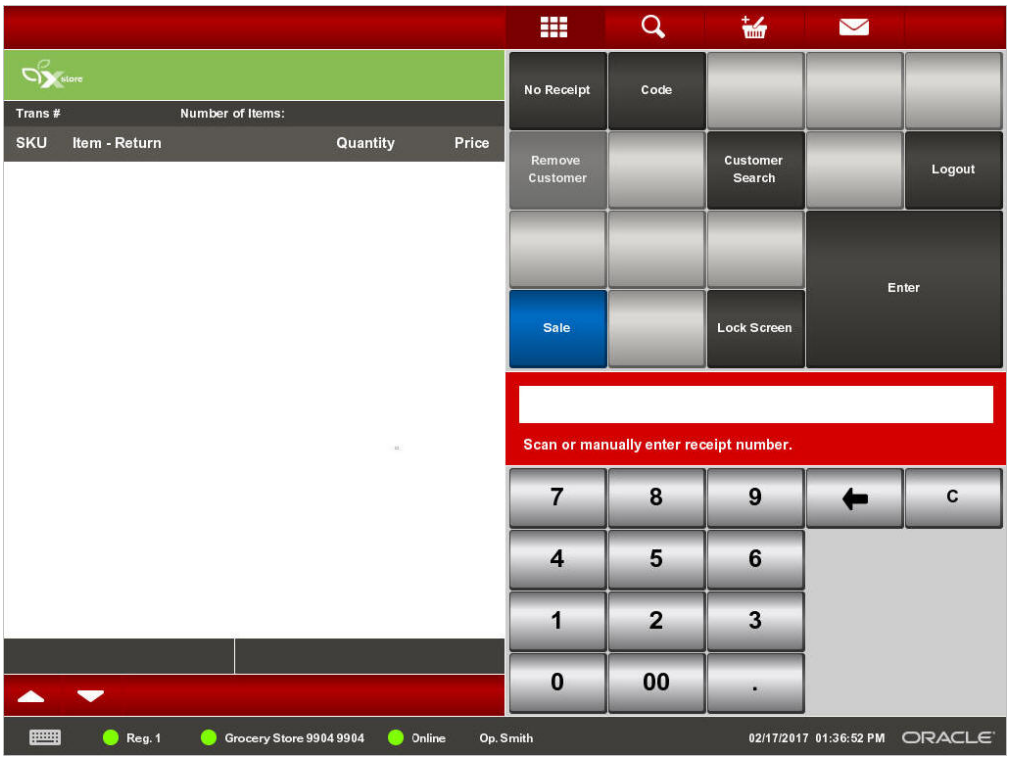
1. Press the **Return** menu button.

   Note: If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. You are now in the Return mode, marked red.

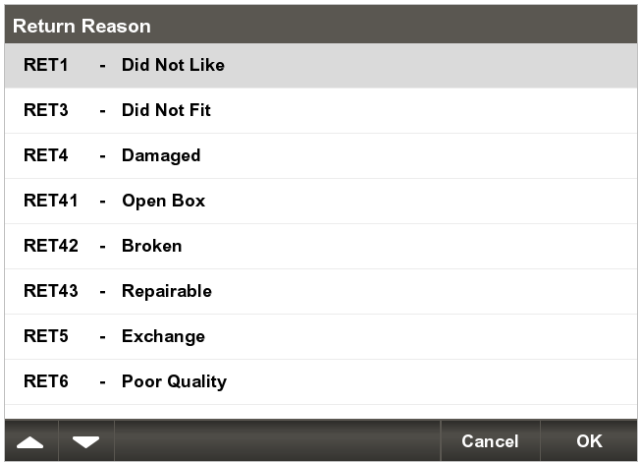
   Note: To return to the Sales screen, use the menu button **Sale,** or press **C** (Clear).

Figure 9–1 Operator Display - Return Screen



3. You are prompted for the receipt number. Press **No Receipt**.
4. You are prompted for the item. Scan or enter the item.
5. The system shows a list of return reasons. Select the corresponding reason and press **OK**.

Figure 9–2 Return Reasons



6. You are prompted for a comment. If necessary, enter a comment and press **OK**.
7. You are prompted for the price. Take the suggested price or enter a new price and press **Enter**.
8. You are prompted for the serial number. Enter the number and press **Enter**.

Note: The system only shows the serial number prompt if the item is configured accordingly.

9. The item is shown in Red on the Sales Display Panel and on the Customer Display.

Figure 9–3 Operator Display - Return Item

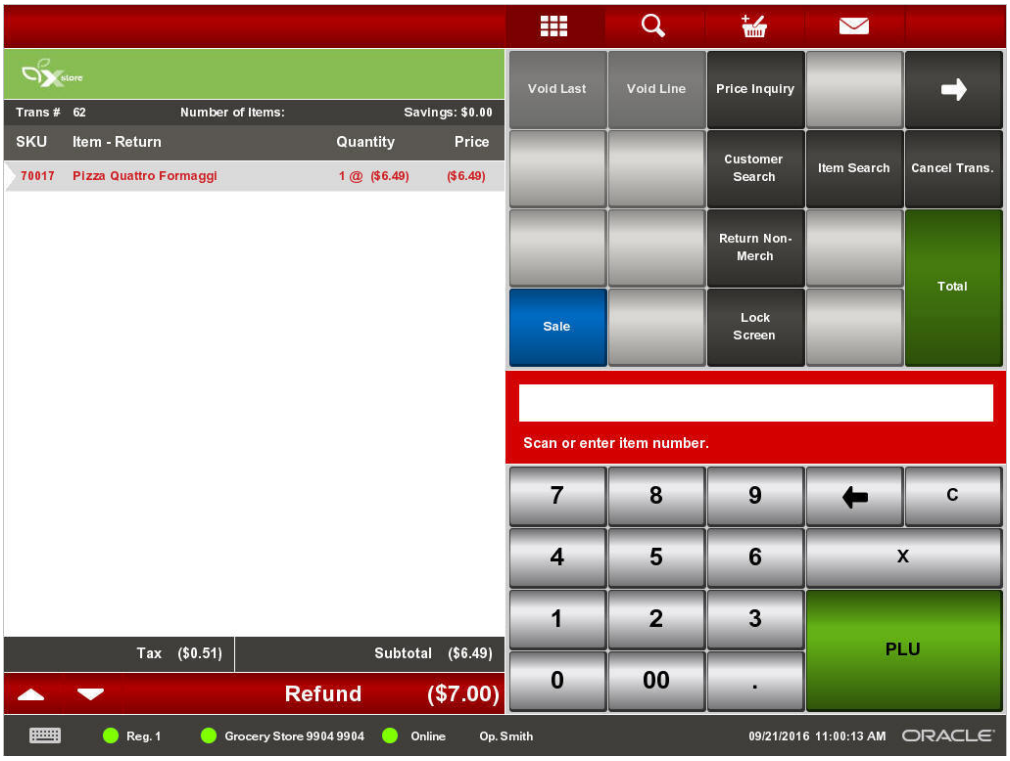
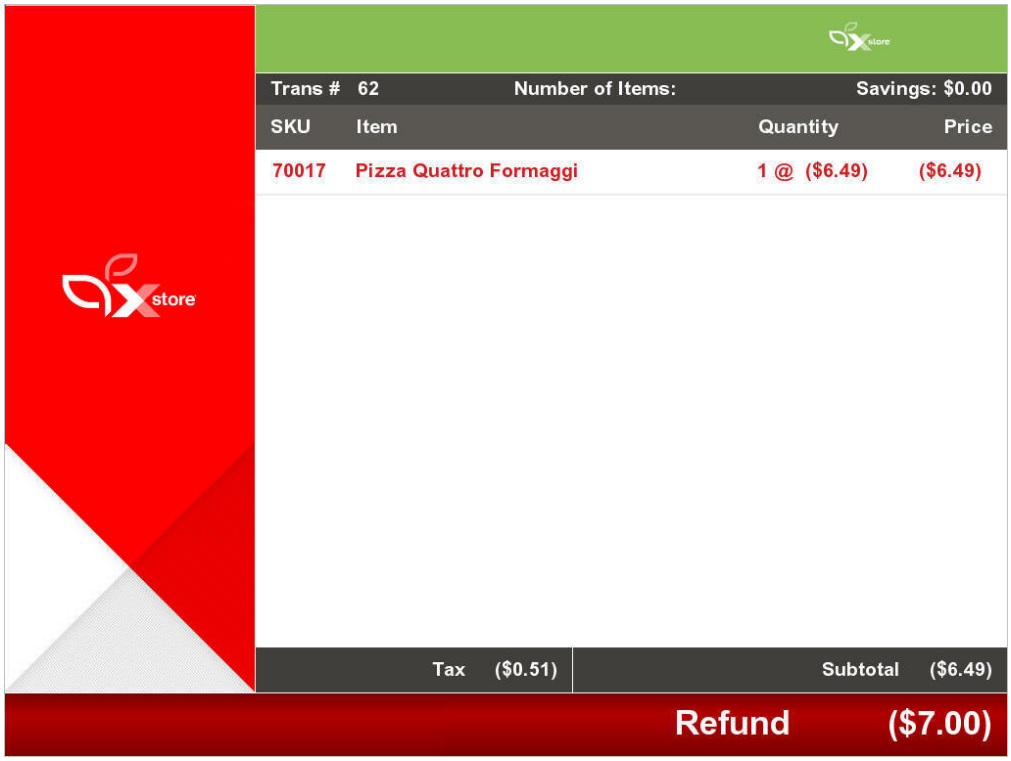


Figure 9–4 Customer Display - Return Item



10. Press **Total**.
11. Select the tender type **Cash**.
12. The Refund amount is shown. The till (cash drawer) opens. Return the money to the customer. You are not allowed to split tenders or perform an overpaymet.The return transaction is completed and the return receipt is printed. Close the till (cash drawer).

Note: If there is no till attached, press **C** (Clear) to return to the Sales screen.

Returning Items with Original Receipt - Verified Return

A verified return is a return with a receipt. To carry out a verified return transaction, follow the steps below.

1. Press the **Return** menu button.

Note: If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

---

2. You are now in the Return mode, marked red.

Note: To return to the Sales screen, use the menu button **Sale,** or press **C** (Clear).

---

3. You are prompted for the receipt number. Enter or scan the receipt number. The system displays a message whether or not the receipt number has been found. To close the message, press **OK**.
4. You are prompted for the item. Scan or enter the item number. The system verifies if the items were purchased on the original receipt.

> **Note:** To return to the Sale screen, use the menu button **Sale**, or press **C** (Clear).

5. The system shows a list of return reasons. Select the corresponding reason and press **OK**.
6. You are prompted for a comment. If necessary, enter a comment and confirm with **OK**.
7. You are prompted for the serial number. Enter the number and confirm with **Enter**.

> **Note:** The system only shows the serial number prompt, if the item is configured accordingly.

8. The item is shown on the Sale Display Panel and on the Customer Display.

> **Note:** You cannot change the sales price from the original receipt.

9. Press **Total**.
10. Then select tender type **Cash**.
11. The Refund amount is shown. The till (cash drawer) opens. Return the money to the customer. You are not allowed to split tenders or perform an overpayment. The return transaction is completed and the return receipt is printed. Close the till (cash drawer).

> **Note:** If there is no till attached, press **C** (Clear) to return to the Sales screen.

Performing an Exchange

You can also return items within a sales transaction in the Xstore Point-of-Service, Lane Checkout User Interface.

1. After you have added several items in a sale transaction, press the **Return** menu button.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. The displays turns red, to indicate that you are in the Return mode.

> **Note:** To return to the Sales screen, use the menu button **Sale**, or press **C** (Clear).

3. You are prompted for the return item. Scan or enter the corresponding item.
4. The system shows a list of return reasons. Select the corresponding reason and press **OK**.
5. You are prompted for a comment. If necessary, enter a comment and press **OK.**
6. You are prompted for the price. Take the suggested price or enter a new price and press **Enter**.
7. You are prompted for the serial number. Enter the number and press **Enter**.

> **Note:** The system only shows the serial number prompt, if the item is configured accordingly.

8. The returned item is shown on the Sales Display Panel and on the Customer Display.
9. Then choose one of the following options.
   - Press **Sale** to add additional items to the transaction.
   - Press **Total**. The system calculates the Amount Due.
10. Complete the transaction with a tender type. The receipt is printed and the Change Due amount is shown. Close the till (cash drawer).

> **Note:** If there is no till attached, press **C** (Clear) to return to the Sales screen.

Returning Non-Merchandise Items

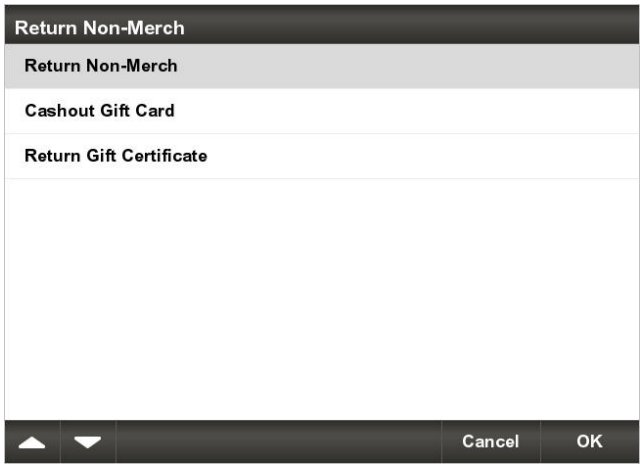
To return a non-merchandise item, follow the steps below.

1. Press **Return**.
2. Select **No Receipt**.

> **Note:** Non-merchandise items are only available for returns in No Receipt transactions.

3. Press **Return Non-Merch**. The system displays a list of non-merchandise categories available for return.

Figure 9–5 Return Non-Merchandise

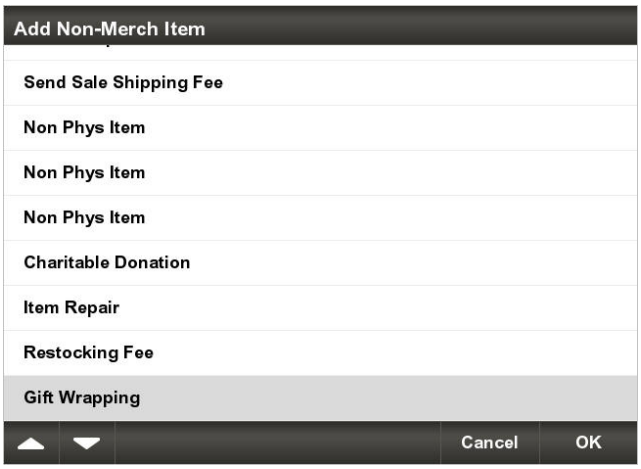


4. Select Return Non-Merchandise Item and press **OK**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

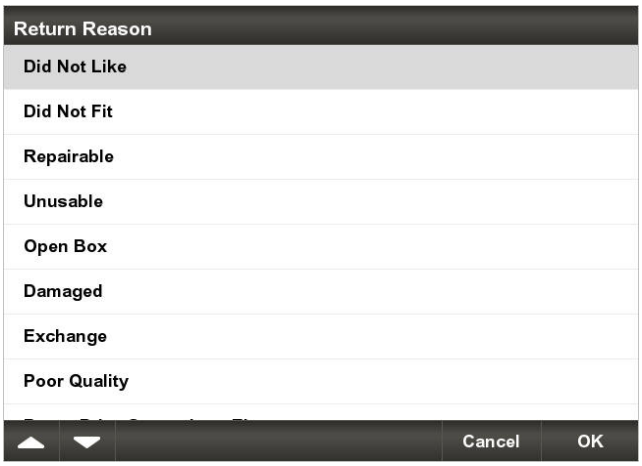
5. You are prompted to add the item. Select a non-merchandise item from the list and press **OK**.

Figure 9–6 Add Non-Merchandise Item



6. You are prompted for the return reason. Select a return reason from the list and press **OK**.

Figure 9–7 Return Reason



7. You are prompted to add a comment. If necessary, enter a comment and press **OK**.
8. The selected item and the price are displayed in the Focus Bar. Take the suggested price or enter a new price and press **Enter**.
9. The item is shown on the Sales Display Panel and on the Customer Display.

Figure 9–8 Operator Display - Returning a Non-Merchandise Item

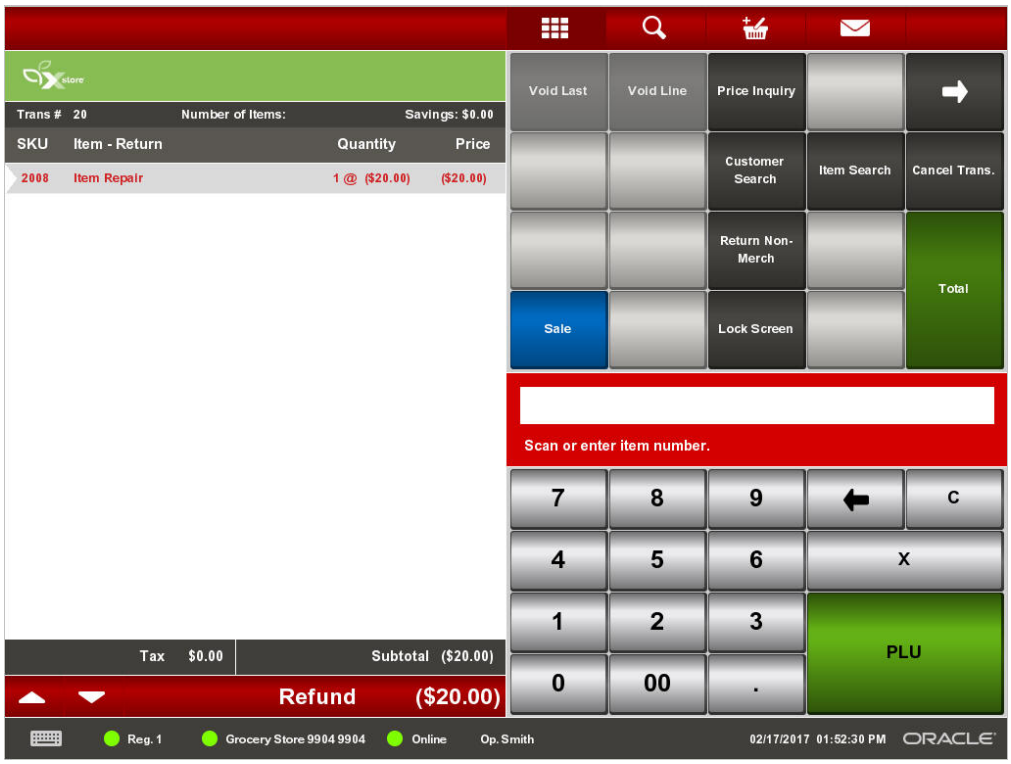
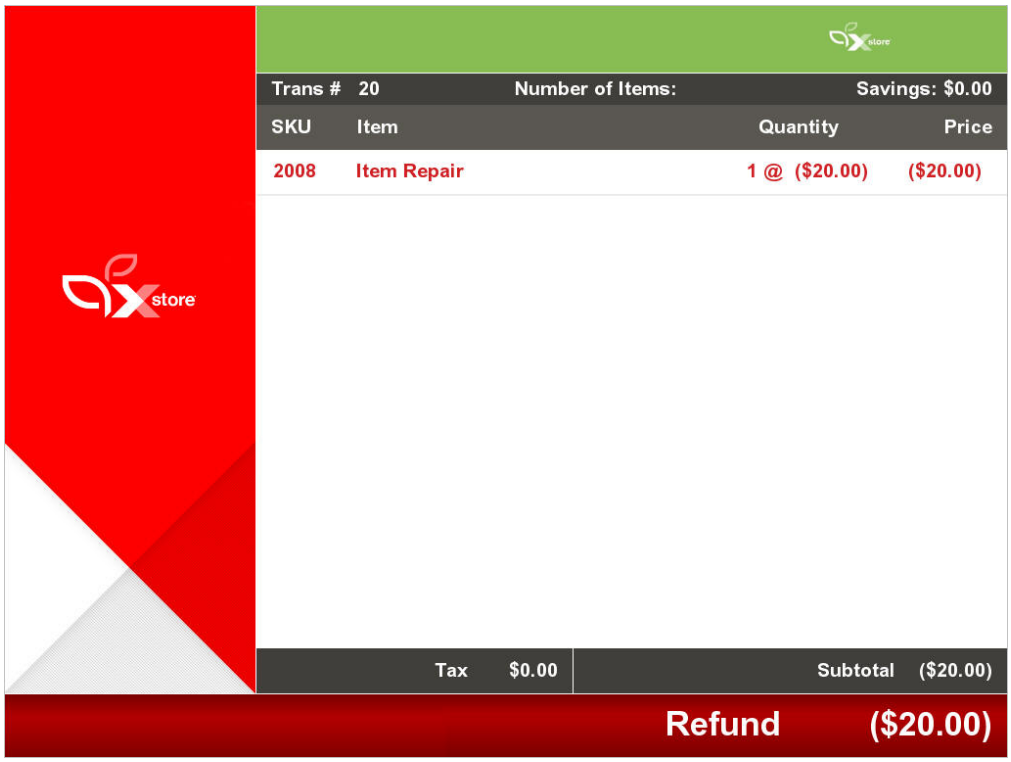


Figure 9–9 Customer Display - Returning a Non-Merchandise Item



10. Press **Total**.
11. Select the tender type **Cash**.
12. The Refund amount is shown. The till (cash drawer) opens. Return the money to the customer. You are not allowed to split tenders or perform an overpaymet.The return transaction is completed and the return receipt is printed. Close the till (cash drawer).

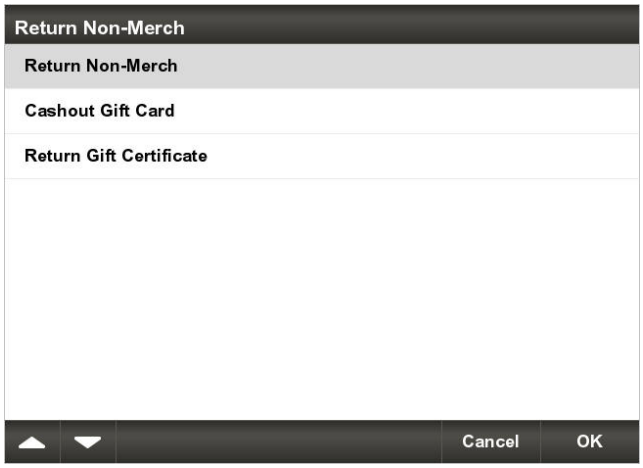
Note: If there is no till attached, press **C** (Clear) to return to the Sales screen.

Returning a Gift Card

To return and cash out a gift card, follow the steps listed below.

1. Press **Return**.
2. Press **No Receipt**.
3. Press **Return Non-Merch**. The system displays a list of non-merchandise categories available for return.

Figure 9–10 Return Non-Merchandise



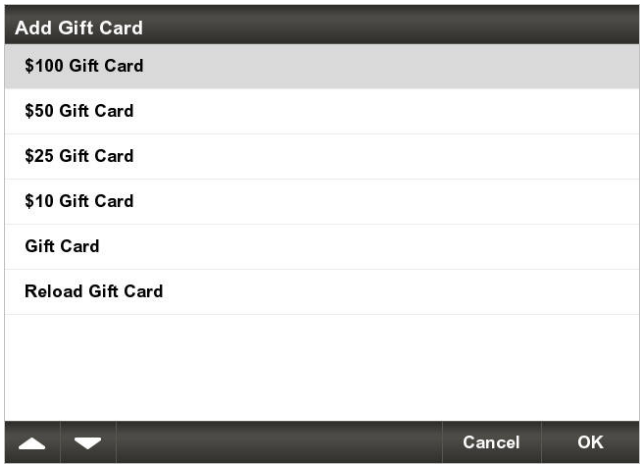
4. Select Cashout Gift Card and press **OK**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

5. You are prompted to add a gift card to the transaction. Select a gift card option and press **OK**.
   - Select Gift Card to return the exact unused gift card amount.
   - Select Reload Gift Card to return the last gift card reload amount.
   - Select a gift card amount to return a fixed amount.

> **Note:** If the customer attempts to return a partially used gift card with a fixed amount, the system displays an error message. Click **OK** to close the message.

Figure 9–11 Add Gift Card



6. You are prompted for a reason code. Select a reason code from the list and press **OK**.
7. You are prompted to add a comment. If necessary, enter a comment and press **OK**.
8. You are prompted to enter the gift card number. Scan, or enter the gift card number and press **Enter**.
9. The system validates the gift card number.

> **Note:** If the gift card number cannot be found in the system, you receive a corresponding message. Press **OK** to close the message.

10. The system authorizes the return. The gift card is displayed on the Sales Display Panel and the Customer Display.
11. Press **Total**.
12. Select the tender type **Cash**.
13. The Refund amount is shown. The till (cash drawer) opens. Return the money to the customer. You are not allowed to split tenders or perform an overpayment. The return transaction is completed and the return receipt is printed. Close the till (cash drawer).

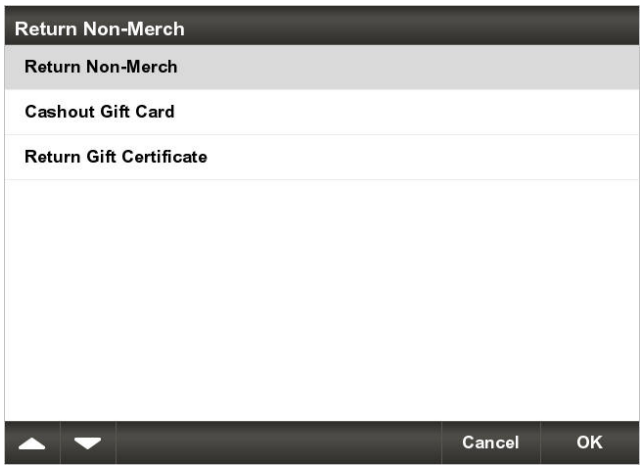
> **Note:** If there is no till attached, press **C** (Clear) to return to the Sales screen.

Returning a Gift Certificate

To return a gift certificate, follow the steps below.

1. Press **Return**.
2. Select **No Receipt**.
3. Press **Return Non-Merch**. The system displays a list of non-merchandise categories available for return.

Figure 9–12 Return Non-Merch

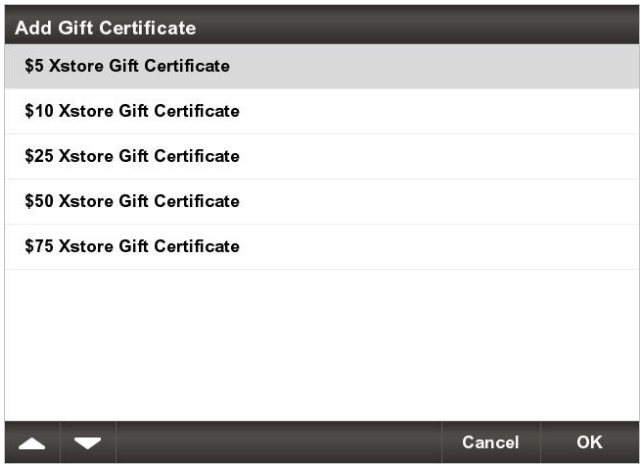


4. Select Return Gift Certificate and confirm with **OK**.

Note: If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

5. You are prompted to add the gift certificate to the transaction. Select the gift certificate from the list and press **OK**.

Figure 9–13 Add Gift Certificate



6. You are prompted for the return reason. Select a return reason from the list and press **OK**.
7. You are prompted to add a comment. If necessary, enter a comment and press **OK**.
8. The selected gift certificate is displayed in the Focus Bar. You are prompted to scan or enter the gift certificate number. Scan, or enter the gift card number and press **Enter**.
9. The system validates the gift certificate number.

Note: If the gift certificate number cannot be found in the system, you will receive a corresponding message. Press **OK** to close the message.

10. The system authorizes the return. The gift certificate is shown on the Sales Display Panel and on the Customer Display.
11. Press **Total**.
12. Select the tender type **Cash**.
13. The Refund amount is shown. The till (cash drawer) opens. Return the money to the customer. You are not allowed to split tenders or perform an overpaymet.The return transaction is completed and the return receipt is printed. Close the till (cash drawer).

Note: If there is no till attached, press **C** (Clear) to return to the Sales screen.

10

Customer Search

In the Xstore Point-of-Service, Lane Checkout User Interface you can search for customers, view customer information and attach a customer to a transaction. This chapter describes how to search for a customer as well as how to add and remove a customer to/from transactions.

Linking a Customer to a Transaction

You can link a customer to the current sales transaction. You can link the customer to the current transaction at the following stages.

- at the beginning of the transaction
- after you have entered several items
- during the tendering process, before tenders have been applied.

Link a customer to the current transaction by scanning the customer loyalty card or by using the Customer Search function.

Scanning Customer Loyalty Card

To link a customer to the current transaction by scanning the customer loyalty card, follow the steps below.

1. Scan the customer loyalty card.
2. The customer is shown in the Customer Awards Bar on the Sales Display Panel as well as on the Customer Display.

Searching for a Customer

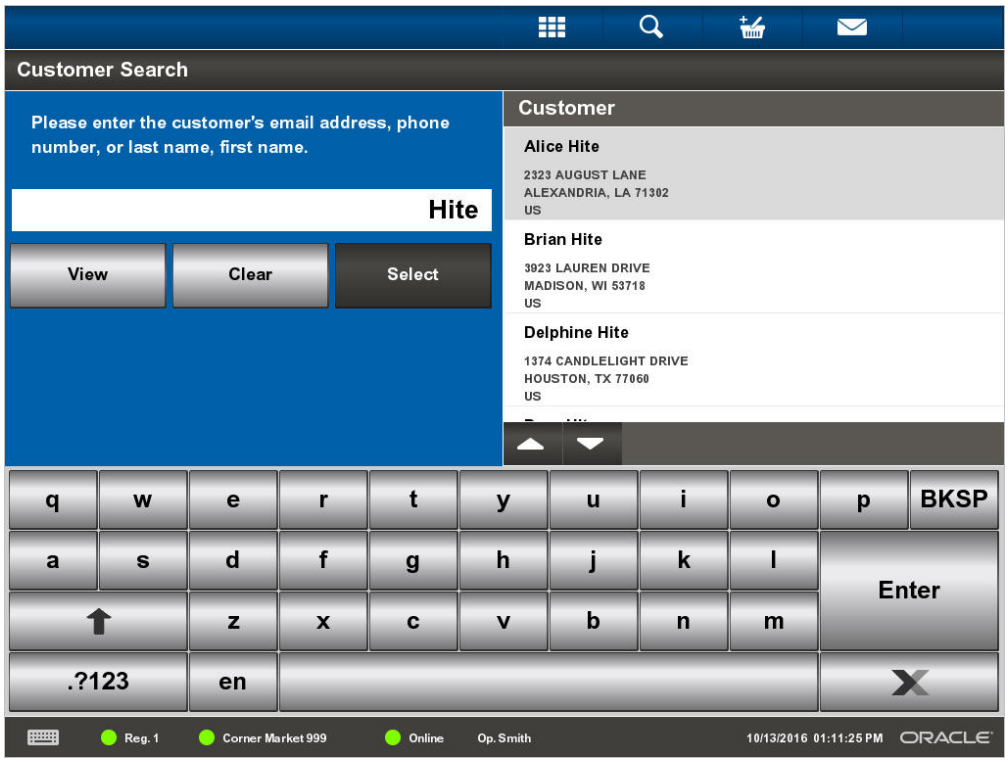
To use the Customer Search function, follow the steps below.

1. Press the **Customer Search** menu button, or tab on the Customer Awards Bar.

   Note: If you tab on the Customer Awards Bar when a customer is already linked to the transaction, the Customer Information Screen appears.

2. The system shows the Customer Search Screen with the virtual keyboard. You can search for the customer by email address, phone number, by the last name or by last and first name.
3. Press **Search** or **Enter**. The search results are shown.

Figure 10–1 Customer Search



Note: Depending on your system's configuration, the customer search might vary. Possible configurations are:

The search starts after you have selected **Search** or **Enter**.

The search starts automatically, after you have entered a defined number of characters.

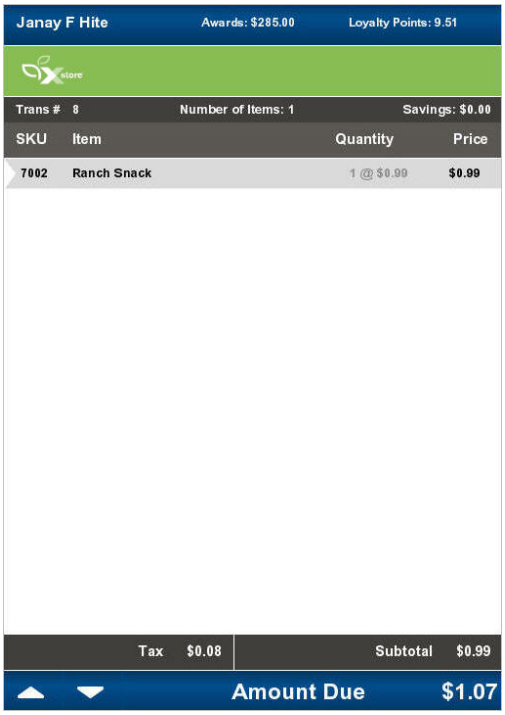
If there are more than 50 search results, a message is displayed. You have to narrow down your search.

If no search result is found, you receive a corresponding message.

You can clear the search results with **Clear**.

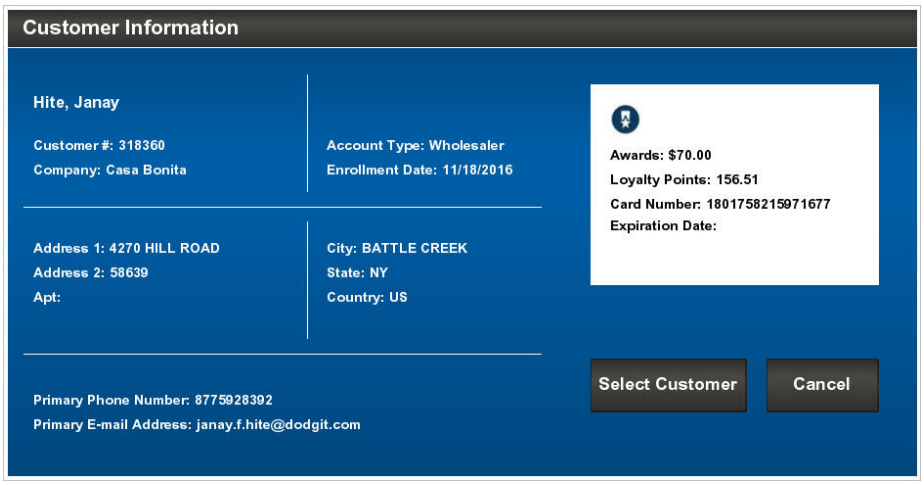
4. Use the up and down arrows, or swipe through the list. Select the corresponding customer.
   a. Press **Select** to link the customer to the current transaction.
      – If more than one loyalty card is associated with the customer account, a prompt listing all available loyalty cards is displayed.
      – Select the desired loyalty card and press **OK**.
      – The customer is shown in the Customer Awards Bar on the Sales Display Panel as well as on the Customer Display.

Figure 10–2 Customer Added to Transaction



b. Press **View** to view the detailed customer information such as customer account, address, contact and loyalty card information.

Figure 10–3 Customer Information



– Press **Select Customer** to link the customer to the current transaction.

– Press **Cancel** to exit the Customer Information.

5. Complete the transaction as usual. The selected customer is printed on the receipt.

Changing the Language of the Customer Display

The language of the Customer Display can be switched to the language stored in the data base for this particular customer. This option is independent from the system user. Therefore the customer and operator/user languages do not have to be the same.

1. Select a customer with a different language than the user language. For more information on searching for a customer, see the Linking a Customer to a Transaction section.
2. Add the customer to the current transaction. If the stored customer language is different than the operator/user language, the system switches the language of the Customer Display. For example, the language on the Operator Display is English and the language on the Customer Display is German.

Removing a Customer from the Transaction

You can also remove a previously added customer from the current transaction.

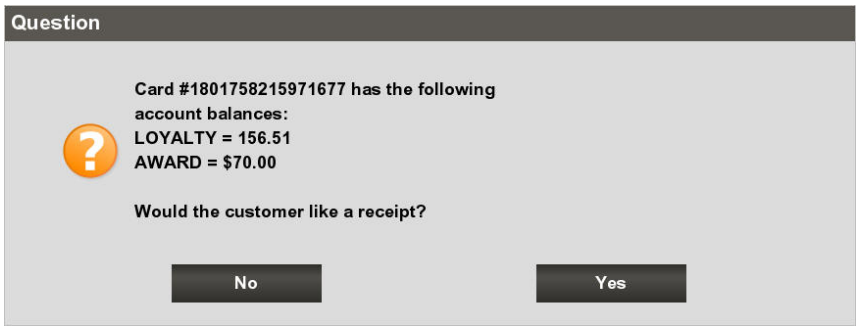
1. Press **Remove Customer**.
2. The customer is removed from the current transaction and not printed on the receipt.

Loyalty Inquiry

You can display the customer awards in the Xstore Point-of-Service, Lane Checkout User Interface.

1. Press **Loyalty Inquiry**.
2. You are prompted to enter the loyalty card number. Scan, or enter the card number.
3. The awards and loyalty points for the selected loyalty card are displayed. You are prompted if you would like to print a receipt.

Figure 10–4 Loyalty Card information



- Select **Yes** to print a receipt displaying the awards and loyalty points.
- Select **No** to close the prompt.

11

Item Search

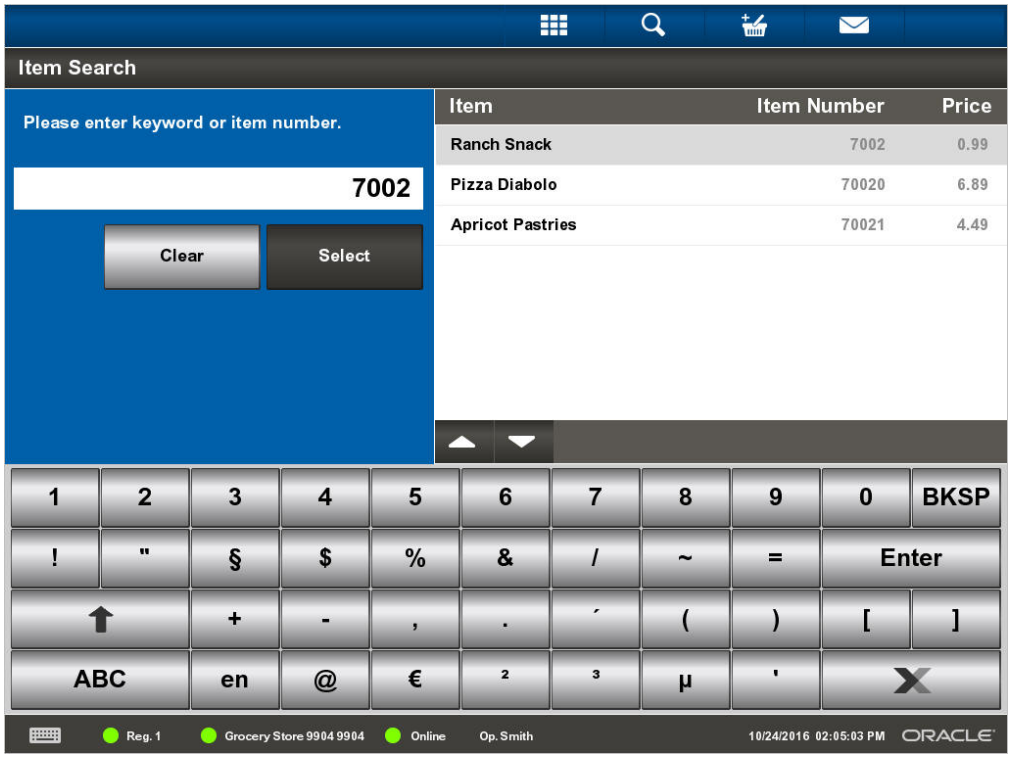
During a transaction you may need to search for a particular item. You can add an item to the current transaction by using the Item Search function.

Searching for an Item

To search for an item and add the item to the current transaction follow the steps below.

1. Select **Item Search**.
2. The system shows the item search screen with the virtual keyboard. Enter the item description or item number.
3. Press **Search** or **Enter**. The search results are shown.

Figure 11–1 Item Search



Note: Depending on your system's configuration the item search might vary. Possible configurations are:

The search starts after you have selected **Search** or **Enter**.

The search starts automatically, after you have entered a defined number of characters.

If there are more than 50 search results, a message is displayed.You have to narrow down your search.

If no search result is found, you receive a corresponding message.

You can clear the search result with **Clear**.

4. Use the up and down arrows, or swipe through the list. Select the desired item.
5. Press **Select**. The system adds the selected item to the transaction.
6. Complete the transaction as usual.

12

Managing Till Options

This chapter lists all available till options for Xstore Point-of-Service, Lane Checkout User Interface.

Till Management

There are two types of till management:

- Till Accountability
- Register Accountability

Till Accountability: A till is assigned to a specific operator. At the automatic register open, you have to enter the float amount. The assigned till can be attached to any register the operator may work on during the day.

At the end of the operator's shift, the operator must return the assigned till to the cash management office for reconciliation. This allows two operators to share a single POS register while keeping their tills separate.

Register Accountability: A till is assigned to a register and can be used by any operator that uses the register. The first associate who signs on to the register is responsible for opening the till. The associate is then required to count the drawer. This process assigns the drawer to the current register.

Depending upon your store policy, the operator enters the total amount of cash in the till, or enters the quantity of each cash denomination. If a float amount (a configurable value) has been left in the till, the system calculates the difference between the float amount and the actual opening amount entered, and if there is a difference, allows the operator to recount the till or accept the new amount.

Till Accountability - Automatic Register Open at Login

To open the register, follow the steps listed below.

Note: Before you can open the register, you need to open the store and the store bank. Open the Xstore Point-of-Service application to open the store and store bank.

Refer to the *Oracle Retail Xstore Point-of-Service Software User Guide* for more information about opening the store.

Refer to the *Oracle Retail Xstore Point of Service Manager's Guide* for more information about managing the store bank.

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1. If you switch on the register at the beginning of a business day, the system prompts for the user name. Enter your user name and press **Enter**.
2. Enter your password and press **Enter**. For security purposes, your password displays as a row of asterisks.
3. The system shows the business date. Press **OK**.
4. The Xstore Point-of-Service, Lane Checkout User Interface opens the register. The Register Open receipt is printed.
5. You are prompted for a till. Select the corresponding till and press **OK**.
6. The receipt with the issued till, cashier ID and starting cash amount is printed.
7. You are prompted for the float amount of the till. Enter the amount and press the corresponding currency.
   a. **Amount correct:** If the entered amount matches the system amount for the till, the system prompts to verify, if the entered starting cash amount is correct.
      – Confirm the entered amount with **Yes**.
   b. **Amount not correct:** If the entered amount does not match the system amount, the system prompts for whether you want to accept the difference. Confirm the difference with **Yes** or press **No** to enter another amount.

      If you confirm the difference with **Yes**:
      – You are prompted for the reason. Select a reason and press **OK**.
      – You are prompted for a comment. Enter your comment and press **OK**.
8. The system prints the Begin Count receipt.
9. Additionally, the system prints the receipt Attach Till, for example, till 1 has been attached to register1.
10. You are now logged on to the register. You can start your sales transaction.

Register Accountability - Automatic Register Open at Login

To open the register, follow the steps listed below.

Note: Before you can open the register, you need to open the store.

Refer to the *Oracle Retail Xstore Point-of-Service Software User Guide* for more information about opening the store.

---

1. If you start the register at the beginning of a business day, the system prompts for the user name. Enter your user name and press **Enter**.
2. Enter your password and press **Enter**. For security purposes, your password displays as a row of asterisks.
3. The system shows the business date.
4. You are prompted for the float amount of the till. Enter the amount and press the corresponding currency.
   a. **Amount correct:** If the entered amount matches the system amount for the till, the system prompts to verify whether the amount is correct.
      – Confirm the entered amount with **Yes**.

b. **Amount not correct:** If the entered amount does not match the system amount, the system prompts to verify whether you want to accept the difference. Confirm the difference with **Yes** or press **No** to enter another amount.

   If you confirm the difference with **Yes**:

   – You are prompted for the reason. Select a reason and press **OK**.

   – You are prompted for a comment. Enter your comment and press **OK**.

5. The system prints the Begin Count receipt.
6. The Xstore Point-of-Service, Lane Checkout User Interface opens the register. The receipt Register Open is printed. You can start your sales transactions.

Configurations Automatic Register Open

The following configurations are possible for the automatic register open process.

Register Accountability

Till Count at Register Close: The system prompts the operator to perform a till closing count at register close.

Transfer No Till Count: Used for registers that do not have a cash drawer or do not handle cash. If enabled, no prompt is shown for begin or end count during the register open or close procedure. The system automatically moves all tender amounts from the register to the store bank.

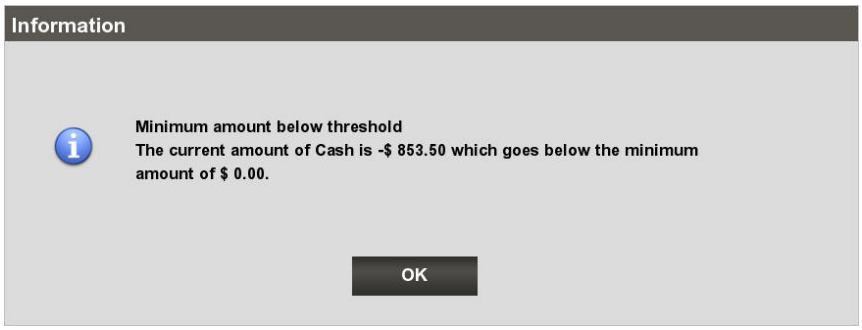
Cash Level Warning

The Xstore Point-of-Service, Lane Checkout User Interface warns the operator if the float amount of the till is over or under the set maximum or minimum values. Cash Level Warnings are shown during the following functions.

- Sales Transaction
- Return
- Post Void
- Paid In Transaction
- Paid Out Transaction
- Cash Transfer
- Cash Pickup

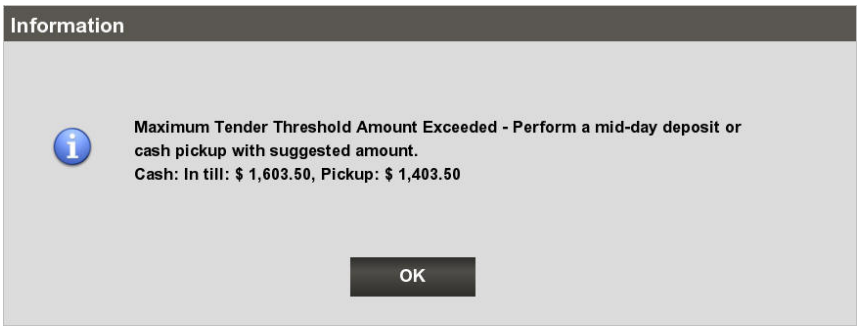
If the entered amount is below the threshold amount, the following prompt is shown.

Figure 12–1 Amount below Threshold



If the entered amount is above the threshold amount, the following prompt is shown.

Figure 12–2 Amount above Threshold



Note: If the cash amount of the till exceeds the set maximum amount, the system prompts the operator to perform a cash pickup with the amount that is the current cash total minus the set maximum amount. For more information about how to perform a cash pickup, see the Cash Pickup section.

Paid In/Paid Out Transaction

A Paid In transaction allows you to move funds into a till from non-sale sources. A Paid Out transaction moves funds out of a till for non-refund purposes.

Note: The system's configuration controls which operators are allowed to move funds in or out of the till. It also specifies the list of valid reasons (reason codes) that an operator can select when performing a paid in or paid out transaction.

Paid Out Transaction

A Paid Out transaction moves funds out of a till for non-refund purposes.

1. To move funds out of the till, use the **Paid Out** menu button.

Note: If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

2. The configured paid out reasons are shown. Select the corresponding reason and press **OK**.
3. You can add a comment to the paid out transaction, if necessary. Enter a comment and press **OK**.
4. You are prompted for the paid out amount. Enter the amount and press **Enter**.
5. The register prints the Paid Out receipt and the till (cash drawer) opens.

Paid In Transaction

A Paid In transaction allows you to move funds into a till from non-sale sources or to move funds from one register to another.

1. To move funds to the till, use the **Paid In** menu button.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. You are prompted to enter the paid out receipt barcode, if configured. Scan, or enter the barcode.
3. The defined paid in reasons are shown. Select the corresponding reason and press **OK**.
4. You can add a comment for the paid in transaction, if necessary. Enter a comment and press **OK**.
5. You are prompted for the paid in amount. Enter the amount and press **Enter**.
6. You are prompted for the tender of the paid in transaction. Select the corresponding tender type and press **OK**.
7. The register prints the Paid In receipt and the till (cash drawer) opens.

Cash Transfer

With the Cash Transfer function, money is taken out of the store bank and put into the till. The register shows a prompt if the cash in the till is under the set minimal amount.

To transfer cash from the store bank to the till, follow the steps below.

1. Press **Cash Transfer**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. You are prompted to select the corresponding currency. Select for example, USD and press **OK**.
3. You are prompted for the cash transfer amount.
4. Enter the cash transfer amount and press **Enter**. The system updates the cash transfer amount to the new value of the till and a receipt is printed.

> **Note:** You can transfer cash multiple times per day.
>
> Every time the till is running low on some denominations, the till can be refilled using this function.

Entering a Safe Bag ID

In the Xstore Point-of-Service, Lane Checkout User Interface you can scan or manually enter a unique identification number for a safe bag during the Cash Transfer process, if configured. This function allows you to monitor the safe bag ID and the amount transferred to a till.

To transfer cash from the store bank to the till and enter a safe bag ID, follow the steps below.

1. Press **Cash Transfer**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. You are prompted to scan or manually enter the safe bag ID.
3. Scan, or enter the safe bag ID and press **Enter**.

> **Note:** The Safe Bag ID process is disabled by default. The Safe Bag ID must be greater or equal to 1.

4. You are prompted to select the corresponding currency. Select for example, USD and press **OK**.
5. You are prompted for the cash transfer amount.
6. Enter the cash transfer amount and press **Enter**. The system updates the cash transfer amount to the new value of the till and a receipt is printed.

> **Note:** You can transfer cash multiple times per day.
>
> Every time the till is running low on some denominations, the till can be refilled using this function.

Cash Pickup

Cash Pickup is a cash drawer feature that allows an operator to take cash from a till so that the amount does not exceed a specified threshold amount. Each tender type that is physically in the till can be picked up, for example, cash, foreign currencies, or coupons. The register shows a prompt, if the cash in the till is over the set maximum amount.

To pick up cash from the till, follow the steps below.

1. Press **Cash Pickup**.

Note: If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. You are prompted to select the corresponding currency. Select for example, USD and press **OK**.
3. You are prompted for the cash pick up amount. Enter the amount and press **Enter**.
4. The till (cash drawer) opens, remove the appropriate amount. The entered amount is transferred from the till to the safe and the system prints a receipt of the cash transfer.

Note: You can perform Cash Pickups multiple times a day.

Every time the cash in the till exceeds a specific threshold amount, the amount can be reduced using this functionality.

Entering a Safe Bag ID

In Xstore Point-of-Service, Lane Checkout User Interface you can scan or manually enter a unique identification number for a safe bag during the Cash Pickup process, if configured. This function allows you to monitor the safe bag ID and the amount transferred from the till to the safe.

To pick up cash from the till and enter a safe bag ID, follow the steps below.

1. Press **Cash Pickup**.

Note: If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. You are prompted to scan or manually enter the safe bag ID.
3. Scan, or enter the safe bag ID and press **Enter**.

Note: The Safe Bag ID process is disabled by default. The Safe Bag ID must be greater or equal to 1.

4. You are prompted to select the corresponding currency. Select for example, USD and press **OK**.
5. You are prompted for the cash pickup amount. Enter the cash pickup amount and press **Enter.**
6. The till (cash drawer) opens, remove the appropriate amount. The entered amount is transferred from the till to the safe and the system prints a receipt of the cash transfer.

Note: You can perform Cash Pickups multiple times a day.

Every time the cash in the till exceeds a specific threshold amount, the amount can be reduced using this functionality.

Till Audit

At a till audit, the user counts the tender in a till. Till audits typically occur when issuing and returning tills to and from the store bank. Counts may also occur at arbitrary times or when performing Cash Pickups.

You can configure a Blind or Non-Blind Till Audit. The Non-Blind Audit is set as the default till audit.

A Blind Audit only shows the user the declared amount and does not provide the system amount to compare against. The Non-Blind Audit provides the expected system amount and the over/short amounts based on what was provided as the declared amount by the user.

Additionally, you can configure levels of denomination values associated with each tender type, for example, cent or dollar.

Non-Blind Till Audit

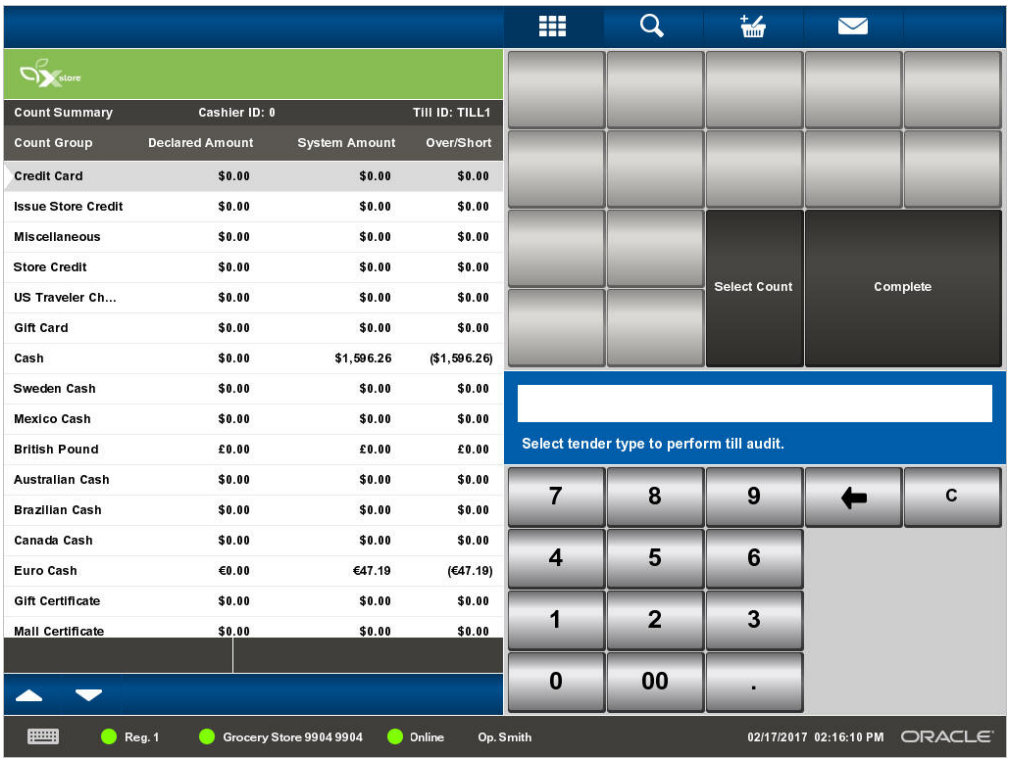
To carry out a non-blind till audit follow the steps below.

1. Select the **Till Audit** menu button.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override" section in Chapter 1.

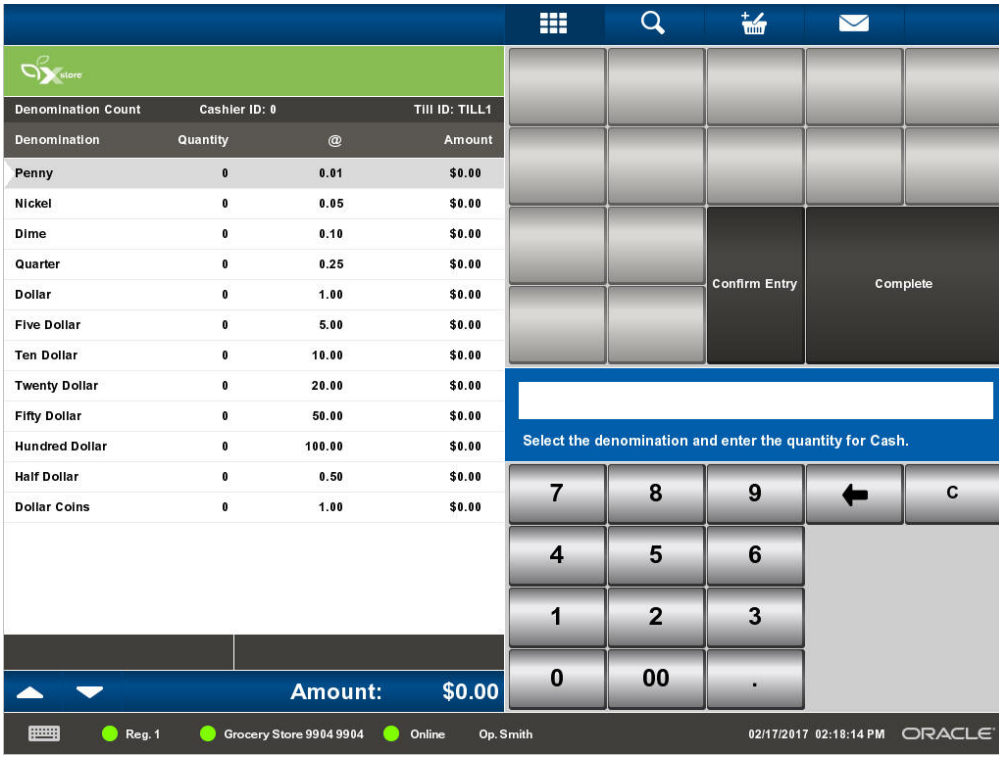
2. All available tender types are displayed in the Count Summary screen, with the following amounts.
   - **System Amount:** The system amount is the expected amount from the system.
   - **Declared Amount:** The declared amount is the amount you enter in the Denomination Count screen.
   - **Over/Short Amount:** The over/short amount shows the difference between system and declared amount.
3. You are prompted to select a tender type for the till audit.

Figure 12–3 Till Audit - Count Summary



4. Select a tender type and press **Select Count**.
5. Depending on the configuration of the selected tender type, the displayed screens vary.
   a. The Denomination Count screen appears.

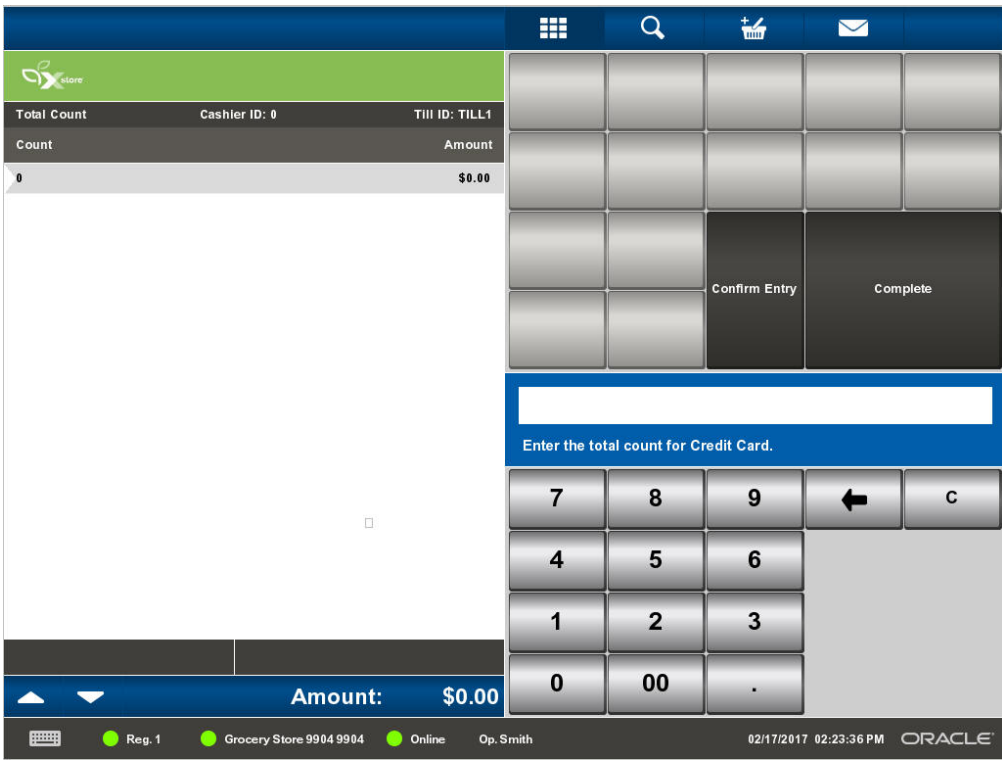
Figure 12–4 Till Audit - Denomination Count



- You are prompted to select a denomination and enter the quantity.
- Select a denomination. Enter the quantity and press **Confirm Entry**. The amount for the denomination and the total amount are displayed on the Sales Display Panel.
- Repeat this process for all available denominations.
- After you have entered all denominations for the tender type, press **Complete**. The system returns to the Count Summary.

b. The Total Count screen appears.

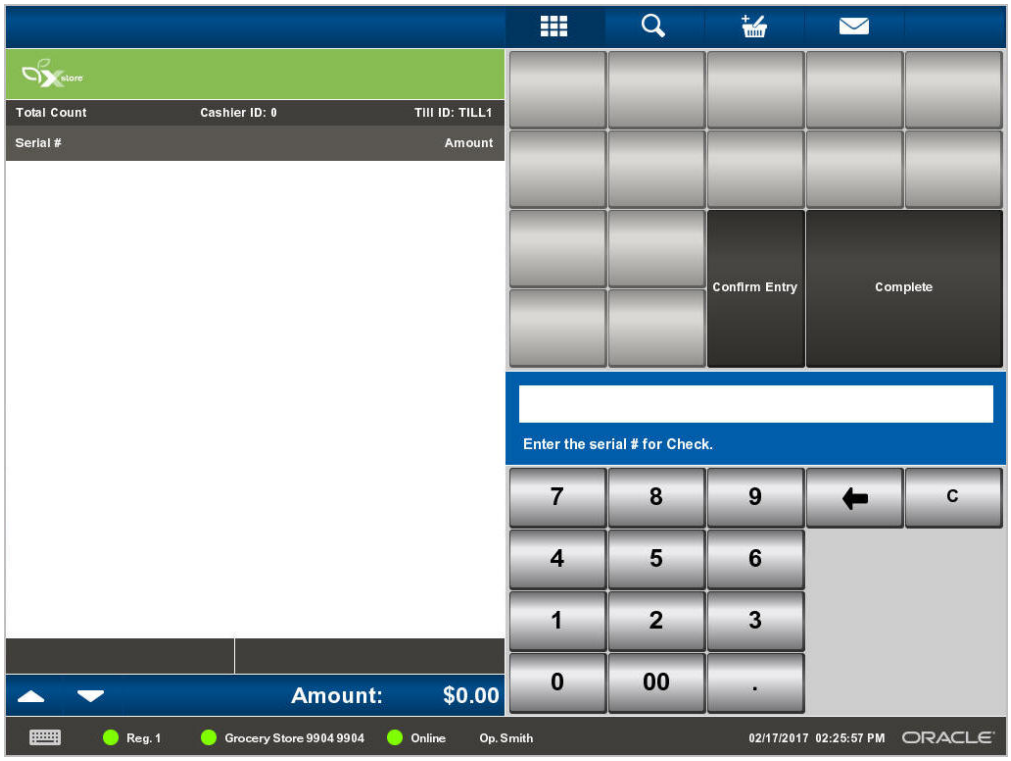
Figure 12–5 Till Audit - Total Count



- You are prompted to enter the total count for the selected tender type.
- Enter the total count and press **Confirm Entry**. The count is displayed on the Sales Display Panel.
- You are prompted for the total amount of the selected tender type.
- Enter the total amount and press **Confirm Amount**. The total amount is displayed on the Sales Display Panel.
- Then select **Complete**. The system returns to the Count Summary.

c. If the Check tender type is selected to count, the Total Count screen is displayed.

Figure 12–6 Till Audit - Tender Check



- You are prompted to enter the serial number for the tender type.
- Enter the serial number and press **Confirm Entry**.
- You are prompted for the amount of the selected tender type.
- Enter the amount and press **Confirm Amount**. The serial number and the entered amount are displayed on the Sales Display Panel. You can repeat this step.
- Then press **Complete**. The system returns to the Count Summary.

Note: Use the **Remove Count** button to remove an entered count from the Sales Display Panel.

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6. Repeat steps 4 to 5 for all necessary tender types (count types).
7. After you have entered all available tender types (count types), press **Complete** to complete the till audit. The system prints the Till Audit receipt.

Blind Till Audit

To carry out a blind till audit follow the steps below.

1. Select the **Till Audit** menu button.

Note: If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

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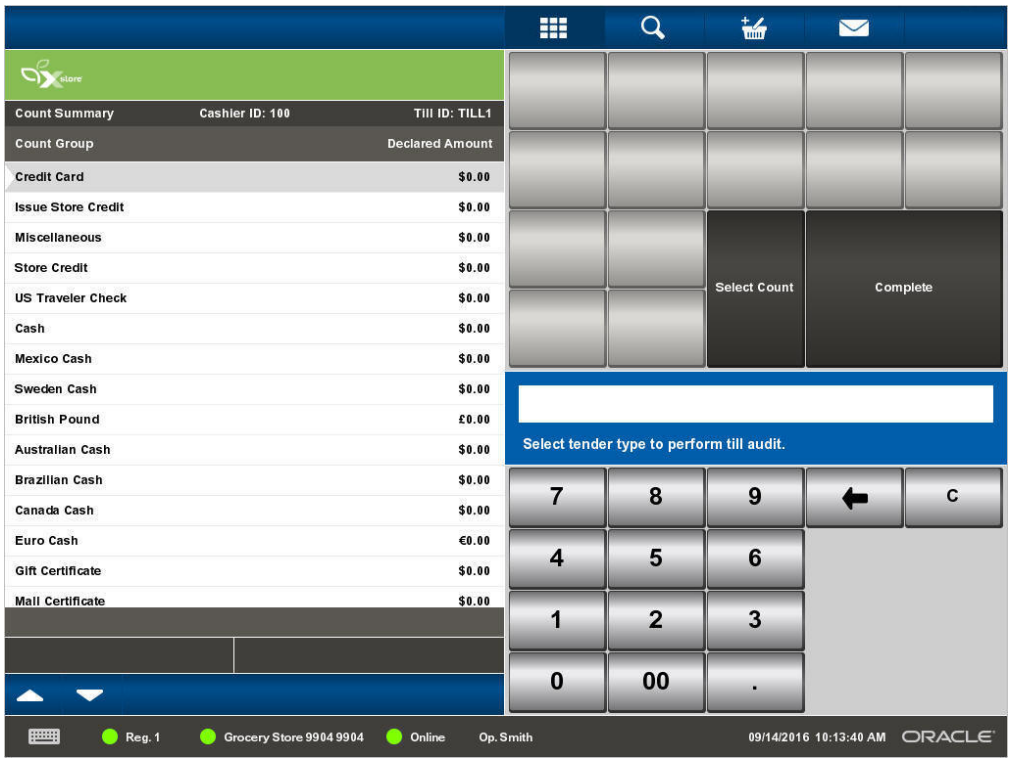
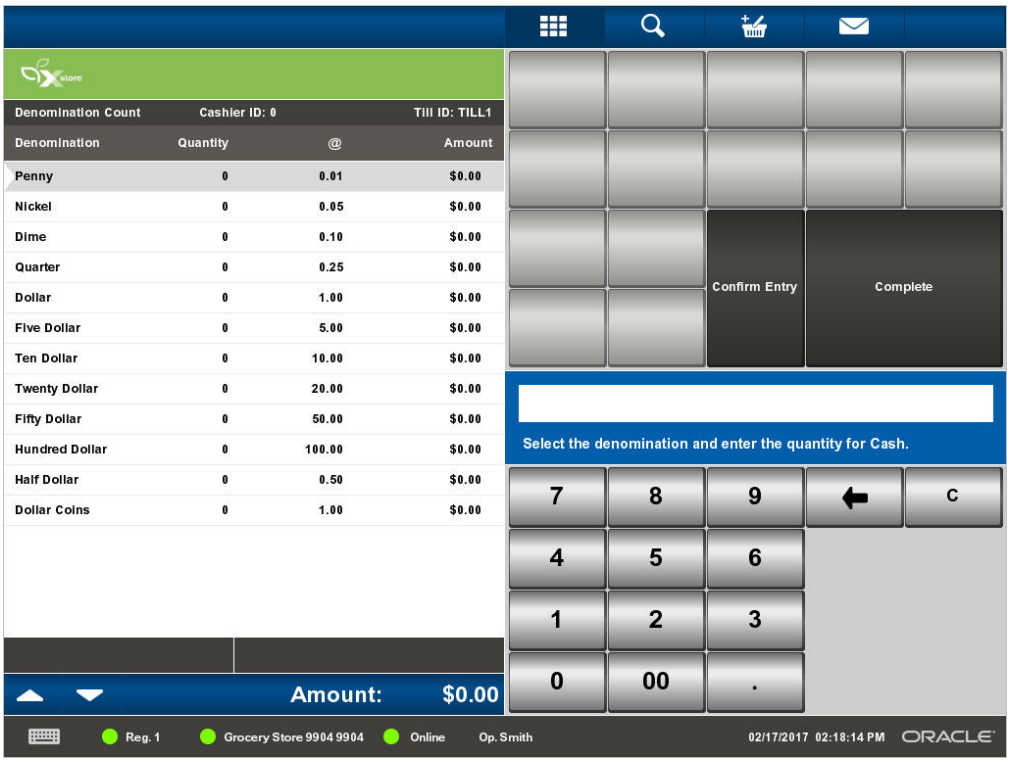
2. All available tender types, with the declared amount, are displayed in the Count Summary screen. The declared amount is the amount you enter in the Denomination Count screen.
3. You are prompted to select a tender type for the till audit.

Figure 12–7 Till Audit - Count Summary



4. Select a tender type and press **Select Count**.
5. Depending on the configuration of the selected tender type, the displayed screens vary.
   a. The Denomination Count screen appears.

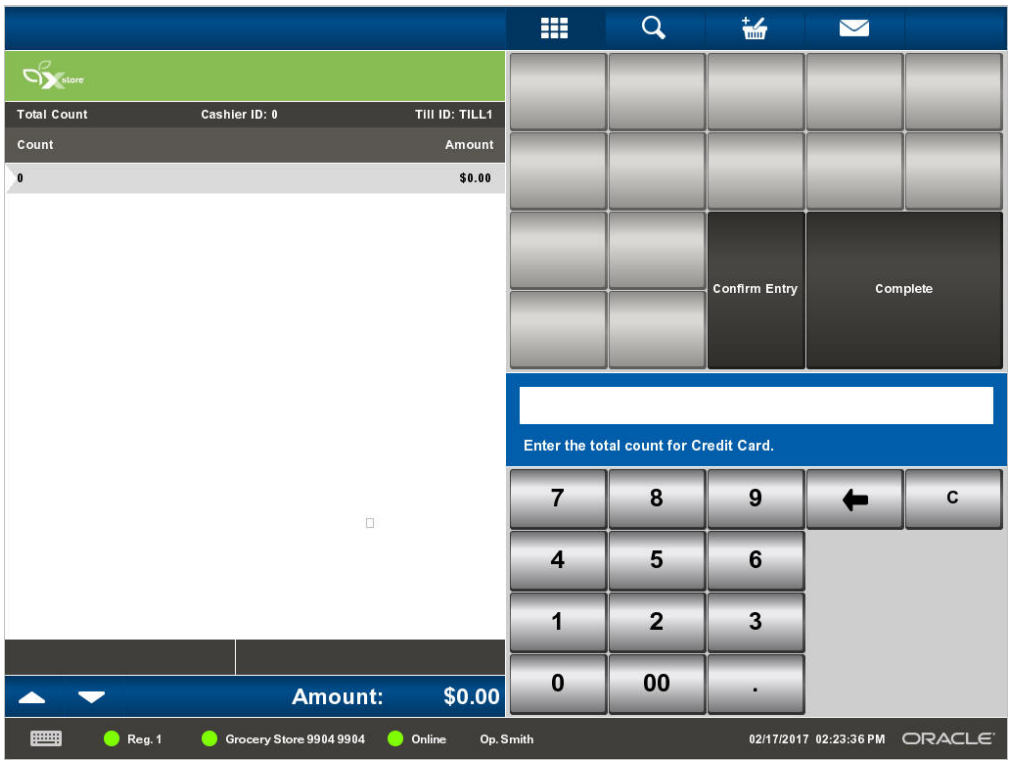
Figure 12–8 Till Audit - Denomination Count



- You are prompted to select a denomination and enter the quantity.
- Select a denomination. Enter the quantity and press **Confirm Entry**. The amount for the denomination and the total amount are displayed on the Sales Display Panel.
- Repeat this process for all available denominations.
- After you have entered all denominations for the tender type, press **Complete**. The system returns to the Count Summary.

b. If no denominations are configured, the Total Count screen appears.

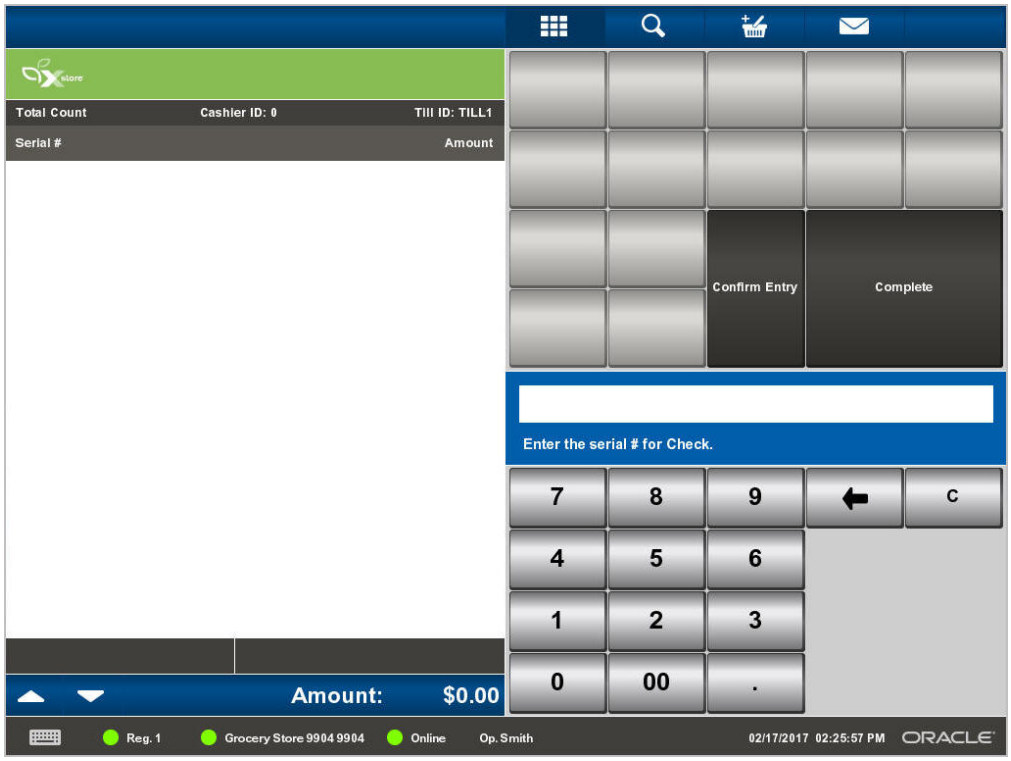
Figure 12–9 Till Audit - Total Count



- You are prompted to enter the total count for the selected tender type.
- Enter the total count and press **Confirm Entry**. The count is displayed on the Sales Display Panel.
- You are prompted for the total amount of the selected tender type.
- Enter the total amount and press **Confirm Amount**. The total amount is displayed on the Sales Display Panel.
- Then select **Complete**. The system returns to the Count Summary.

c. If the Check tender type is selected to count, the Total Count screen is displayed.

Figure 12–10 Till Audit - Tender Check



- You are prompted to enter the serial number for the tender type.
- Enter the serial number and press **Confirm Entry**.
- You are prompted for the amount of the selected tender type.
- Enter the amount and press **Confirm Amount**. The serial number and the entered amount are displayed on the Sales Display Panel.
- Then press **Complete**. The system returns to the Count Summary.

Note: Use the **Remove Count** button to remove an entered count from the Sales Display Panel.

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6. Repeat steps 4 to 5 for all necessary tender types.
7. After you have entered all available tender types, press **Complete** to complete the till audit. The system prints the Till Audit receipt.

Applying Real Time Updates

The Xstore Point-of-Service, Lane Checkout User Interface provides system, deal, tax, pricing and other updates without going offline.

- If the cashier is not in a transaction, updates are automatically applied.
- If the cashier is in a transaction, the update can be applied afterwards or delayed to a later time.

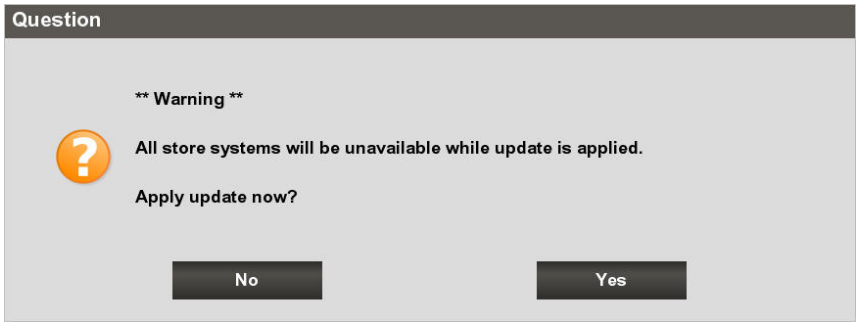
If there are updates available, follow the steps below.

1. You are prompted if you want to apply the updates:
   - after a transaction
   - after you unlock the register again after a pause
   - at login

Figure 12–11 Updates Available

   - Select **Yes** to apply the update now.
   - Select **No**. The update is not applied. The system returns to the Sales screen.
2. If you have selected to apply the update, the system displays an additional prompt. You are informed that all store systems are unavailable while the update is applied.

Figure 12–12 Store System Unavailable



   - Select **Yes**. The updated is applied. You are locked out of the register while the update is applied.
   - Select **No**. The update prompt is delayed for a configurable amount of time.

Note: By default the grace period is set to one hour. After the grace period, the required period starts. The required period is set to 15 minutes by default. During the required period you cannot start new transactions, but you can complete current transactions. Once you are not in a transaction, or the required period has expired, the update is applied automatically.

Closing the Register

Depending on your system's configuration the close register function varies as outlined below.

Till Accountability

If your system has till accountability, follow the steps below to close the register.

1. Press **Close Register**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. The system prints the Remove Till and Register Closed receipts. Remove the till from register. The register is closed. The till count is carried out in the Back Office.

Register Accountability

If your system has register accountability, follow the steps below to close the register.

1. Press **Close Register**.

> **Note:** If you do not have sufficient security privileges to carry out this function, see the "Override"section in Chapter 1.

2. You are prompted to count the till. Enter the amount for the individual tender types and press **Confirm**.
   a. **Out of balance:** If tender types are out of balance, you are prompted to accept the difference.
      – **Yes** - accept the difference and close register.

        You are prompted for the reason. Select the reason and press **OK**.

        You can also add additional comments. Enter a comment and press **OK**.
      – **No** - repeat till count again.
   b. **In balance:** If all entered tender types are in balance, an Information prompt "Till is in balance" is shown. Press **OK** to close the Information prompt.
3. The register is closed, the End Count receipt is printed.
4. The Register Closed receipt is printed. The close register process is completed.

13

24/7 Hour Store Environment

If your system is configured to support a 24 hour store environment, the store never closes. The registers are rolled over to the next business day one by one.

This allows you to open the store on the next day without reconciling or closing the store. These processes have been separated, so that they can be completed on a later date.

Warning Messages

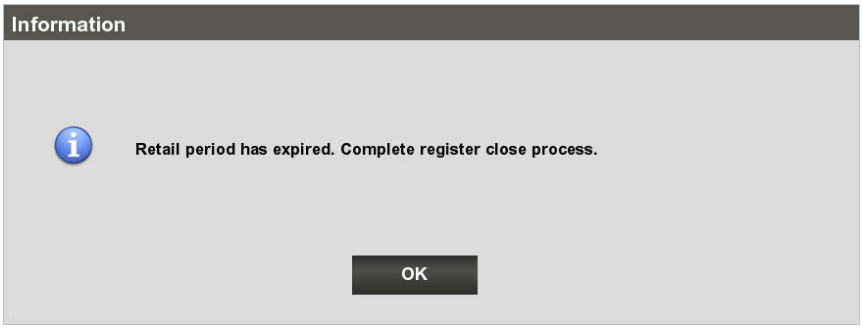
The default time frame for the 24/7 rolling close functionality is 24 hours. When the day end is approaching, the system reminds you to perform the register close processes. Once the retail period has ended, you must close the register by a specified time. The following messages are displayed.

1. One hour before the retail period ends, a warning message is displayed at each register by default. This message appears at the beginning of a transaction, every 10 minutes until the register close process has been started.

   Note: The time frame for the warning messages is configurable.

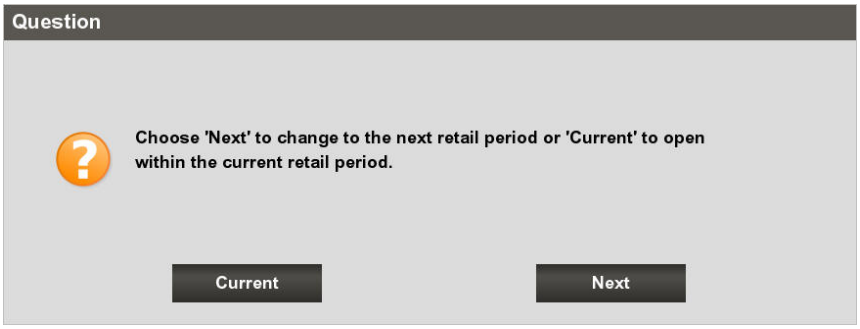
2. When the configured end of retail period time has passed, another message is displayed on each register. The message informs you that the retail period has expired and that you have to close the register.

Figure 13–1 Retail Period Expired



3. If you try to open a register within the warning or grace period (two hours by default), you are prompted if you want to change to the next retail period, or if you want to open the register within the current retail period.

Figure 13–2 Current or Next Retail Period



- Select **Next** to open the register in the next available retail period.

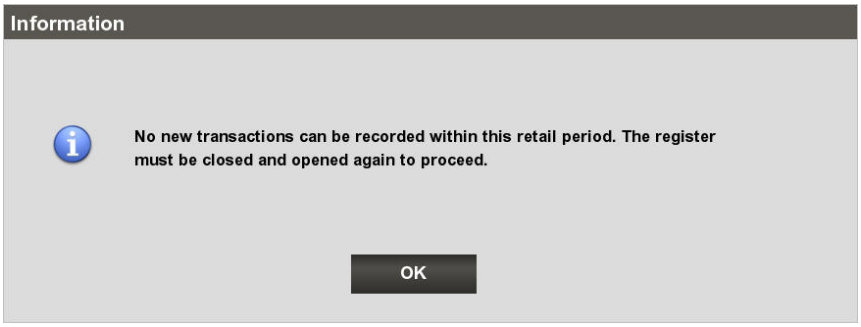
  Note: The register is closed and moved to the next retail period. You cannot re-open the previous retail period.

- Select **Current** to open the register within the current retail period.

4. After the configured store hours time frame and the grace period have passed, all registers that have not been moved to the next retail period are locked. You cannot start new transactions.

   You receive a warning message that you cannot start new transactions within the current retail period. You have to close and open the register again to start a new transaction.

Figure 13–3 No New Transactions



End of Retail Session Process

You have different options to configure the system about the desired process in the 24 hour environment. During the 24 hour flow the cashier is either asked to re-open the register in the close register process automatically, or the register is not opened automatically and the cashier needs to log in to open the register.

Depending on your system's configuration:

- the cashier starts with the pre-defined float
- the remaining balance will be the new float or
- the remaining currencies will be adjusted to the approximate default

- the cashier is prompted for the float

Pre-defined Float

During the register open process, you are prompted to insert a new till into the drawer which includes a pre-configured till amount.

Pre-defined Float - Closing the Register

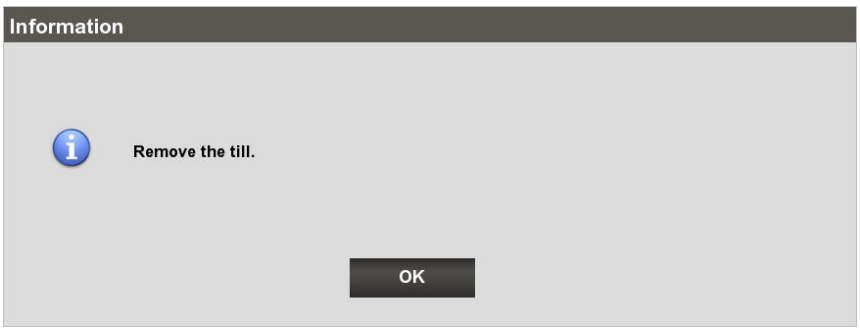
To close the register, follow the steps below.

1. You are prompted if you want to close the register. Press **Yes**.

Figure 13–4 Close Register

2. If you are logged out of the register you are prompted for your user name and password.
   a. Enter your user name and press **Enter**.
   b. Enter your password and press **Enter**.
3. You are prompted to remove the till. Remove the till. Press **OK** to close the message.

Figure 13–5 Remove Till



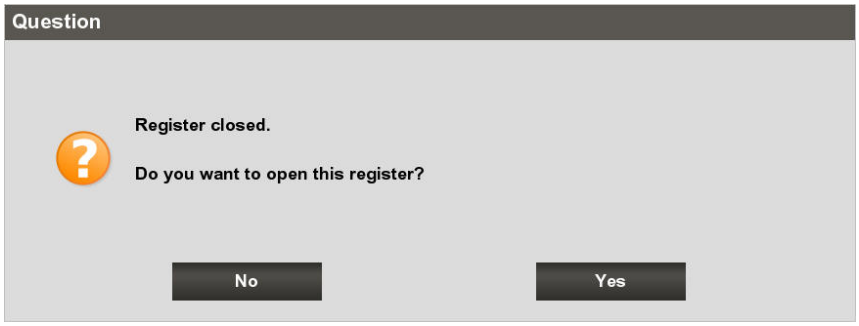
4. You are informed that the register is closed. You are prompted, if you want to open the register. If you want to open the register, see the Pre-defined Float - Opening the Register section.

Pre-defined Float - Opening the Register

To open the register, follow the steps below.

1. You are prompted if you want to open the register. Press **Yes**.

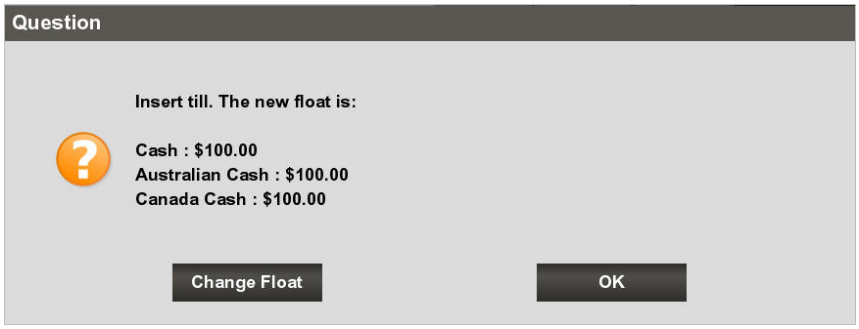
Figure 13–6 Open Register



Note: This prompt is configurable. By default the prompt is enabled. If the prompt is disabled, you are logged out of the register. Log on to the register, the Pre-defined Float Amount prompt is displayed, see Figure 13–7, "Pre-defined Float Amount".

2. You are prompted to insert the till. The float amount of the till is displayed.

Figure 13–7 Pre-defined Float Amount



a. Press **OK** to confirm the float amount.

b. Press **Change Float** to enter a new float amount for the till.

   – You are prompted for a reason. Select the reason and press **OK**.

   – You are prompted to enter a comment. If necessary, enter a comment and press **OK**. The Count Summary appears.

   – Select a tender type and press **Select Count**.

   – Enter the total amount for the selected tender type.

   – Press **Confirm Amount**. The count is displayed in the Sales Display Panel.

   – Press **Complete** to complete the count for the selected tender type and return to the Count Summary.

   – Press **Complete** to complete the count of the float amount.

   – The system displays the new float amount. Confirm the new float amount with **OK**.

Note: Press **Change Float** to carry out another count of the float amount.

– The register is open. Your can start your sales transaction.

3. If there are suspended transactions from the previous retail period, the transactions are displayed. Press **OK** to cancel these transactions.

Note: You can configure the time period to look back when searching for suspended transactions. By default all suspended transactions older than 12 hours are cancelled.

Remaining Balance is New Float

During the register open process, the end balance of the register during the register close process is carried over to the next retail period as the new float amount.

Balance is New Float - Closing the Register

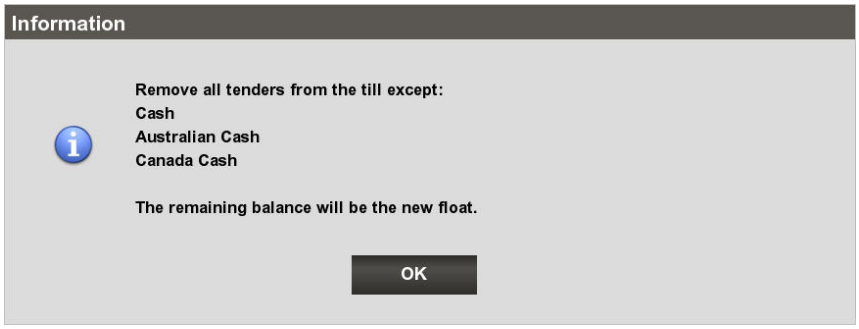
To close the register, follow the steps below.

1. You are prompted if you want to close the register. Press **Yes**.

Figure 13–8 Close Register

2. If you are logged out of the register you are prompted for your user name and password.
   a. Enter your user name and press **Enter**.
   b. Enter your password and press **Enter**.
3. You are prompted to remove all tenders, except for the default cash tenders, for example, for example, checks, traveler's checks. You are informed that the remaining balance will be the new float amount for the next retail period.

Figure 13–9 Balance is New Float



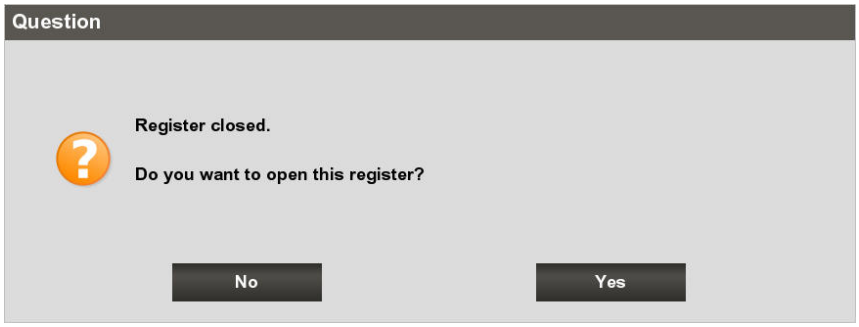
4. Remove the corresponding tenders. Press **OK** to close the message.
5. You are informed that the register is closed. You are prompted if you want to open the register. If you want to open the register, see the Balance is New Float - Opening the Register section.

Balance is New Float - Opening the Register

To open the register, follow the steps below.

1. You are prompted if you want to open the register. Press **Yes**.

Figure 13–10 Open Register



> **Note:** This prompt is configurable. By default the prompt is enabled. If the prompt is disabled, you are logged out of the register. Log on to the register. The end balance of the register is carried over to the next retail period as the new float amount.

2. If there are suspended transactions from the previous retail period, the transactions are displayed. Press **OK** to cancel these transactions.

> **Note:** You can configure the time period to look back when searching for suspended transactions. By default all suspended transactions older than 12 hours are cancelled.

3. The register is open. You can start your sales transaction.

Float Balance

During the register close process, you are be prompted to perform a cash pickup to skim the till to match the approximate float amount.

Float Balance - Closing the Register

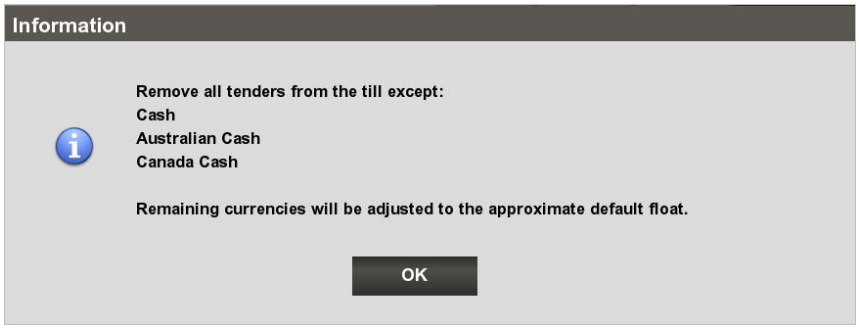
To close the register, follow the steps below.

1. Press **Close Register**.
2. If configured, you are prompted to close the register. Press **Yes**. If the message is not configured, continue with step 3.

Figure 13–11 Close Register

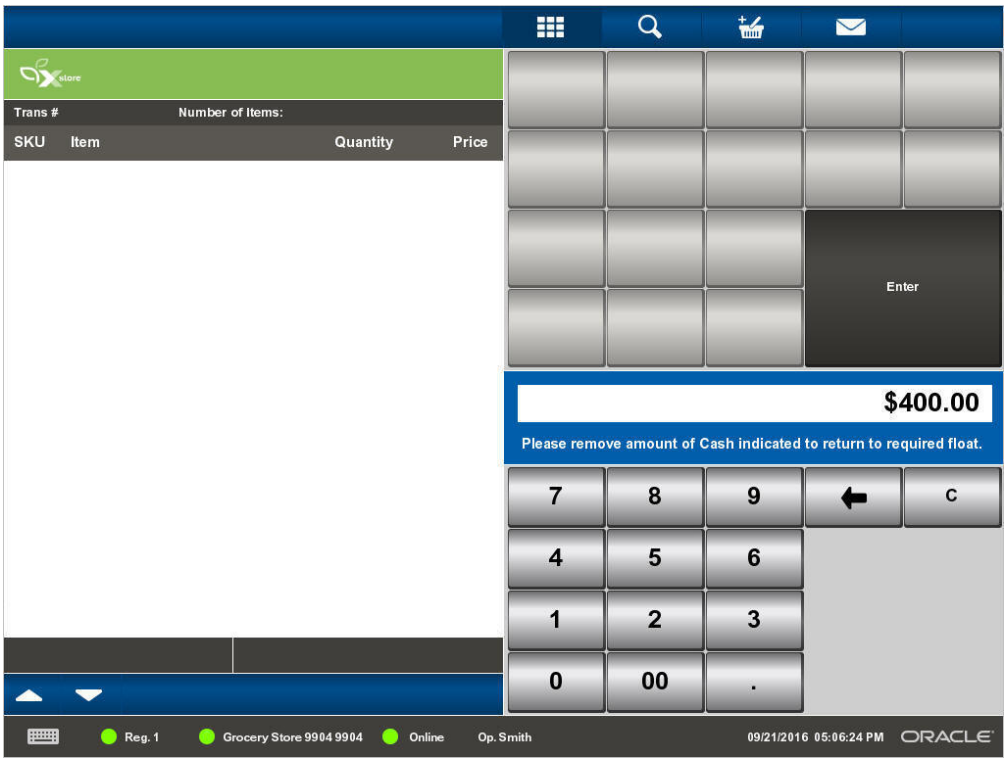
3. You are prompted to remove all tenders, except for checks, traveler's checks, and so on. You are informed that the remaining tenders are adjusted to the approximate default float amount.

Figure 13–12 Adjustment to Default Float



4. Remove all necessary tenders. Press **OK** to close the message.
5. You are prompted to remove the amount that exceeds the configured float amount.

Figure 13–13 Remove Amount



a. Change the suggested amount or confirm the suggested amount with **Enter**.

b. Move the money to the cash deposit bag or safe.

Note: If the till amount needed to be picked up, is less than or equal to the configured float amount, no cash pickup is needed and this step is omitted.

If multiple currencies are configured, this step is repeated until all float currencies have been completed.

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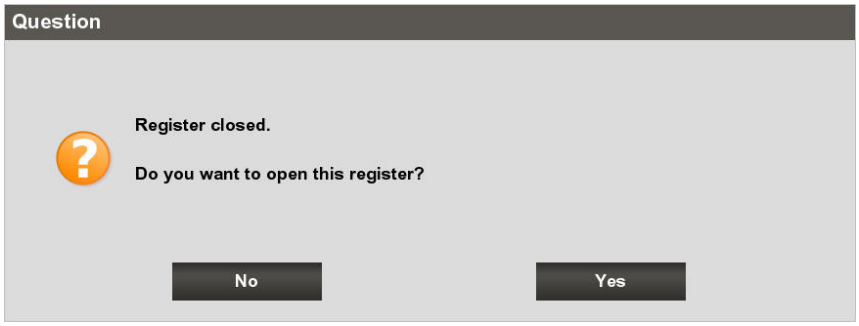
6. You are informed that the register is closed. You are prompted, if you want to open the register. If you want to open the register, see the Float Balance - Opening the Register section.

Float Balance - Opening the Register

To open the register, follow the steps below.

1. You are prompted if you want to open the register. Press **Yes**.

Figure 13–14 Open Register



Note: This prompt is configurable. By default the prompt is enabled. If the prompt is disabled, you are logged out of the register. Log on to the register.

2. If there are suspended transactions from the previous retail period, the transactions are displayed. Press **OK** to cancel these transactions.

Note: You can configure the time period to look back when searching for suspended transactions. By default all suspended transactions older than 12 hours are cancelled.

3. The register is open. You can start your sales transaction.

Prompt for Float

If the function prompt for float is enabled, follow the steps below.

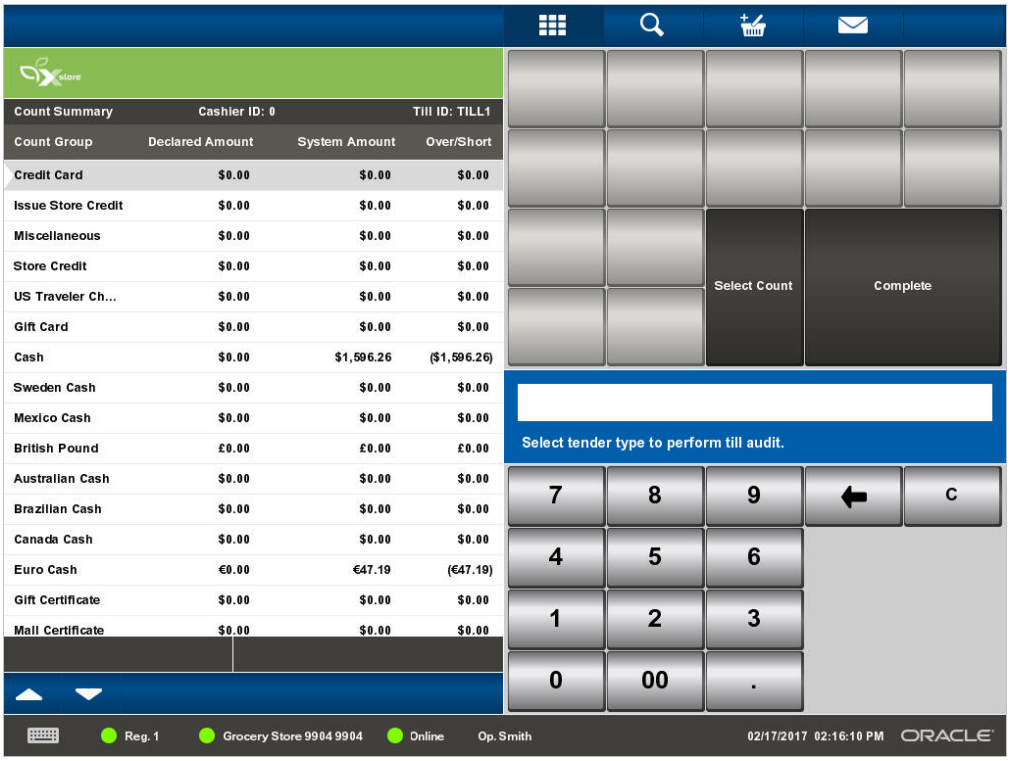
1. Press **Close Register**.
2. If configured, you are prompted to close the register. Press **Yes**. If the message is not configured, continue with step 3.

Figure 13–15 Close Register

Note: If you do not have sufficient security privileges to close the register, see the "Override"section in Chapter 1.

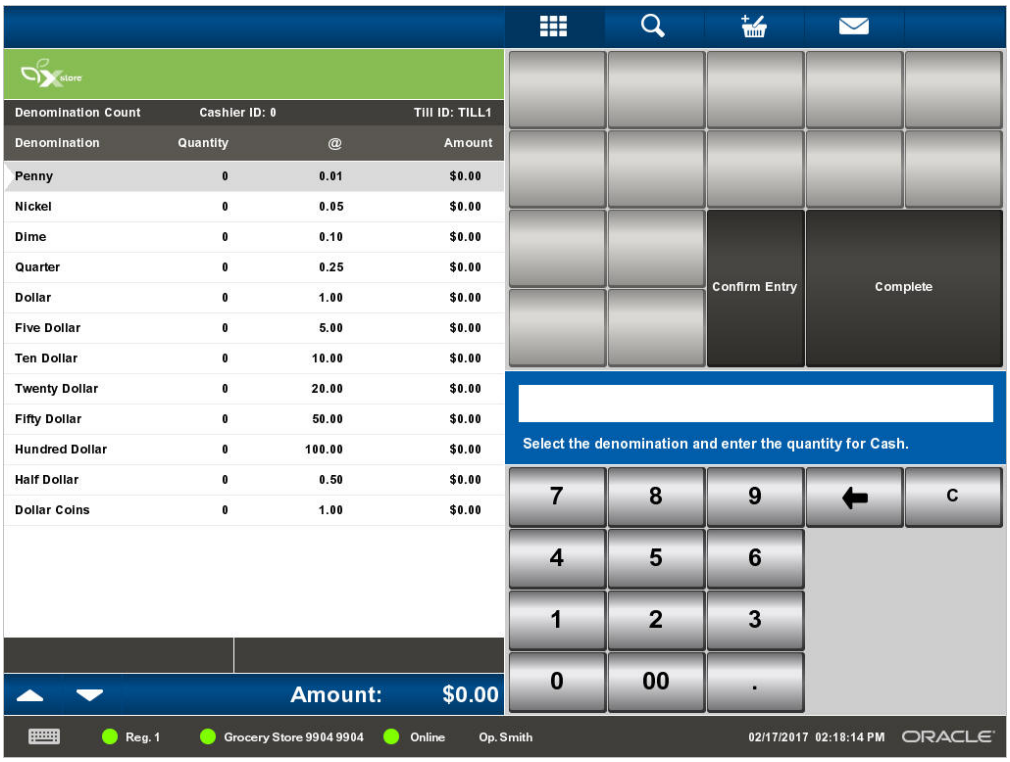
3. You are prompted to remove the till.
4. You are prompted if you want to open the register. Confirm with **Yes**.
5. All available tender types are displayed in the Count Summary screen, with the following amounts.
   - **Declared Amount:** The declared amount is the amount you enter in the Denomination Count screen.
   - **System Amount:** The system amount is the expected amount from the system.
   - **Over/Short Amount:** The over/short amount shows the difference between system and declared amount.
6. You are prompted to select a tender type for the till audit.

Figure 13–16 Till Audit - Count Summary



7. Select a tender type and press **Select Count**.
8. Depending on the configuration of the selected tender type, the displayed screens vary.
   a. The Denomination Count screen appears.

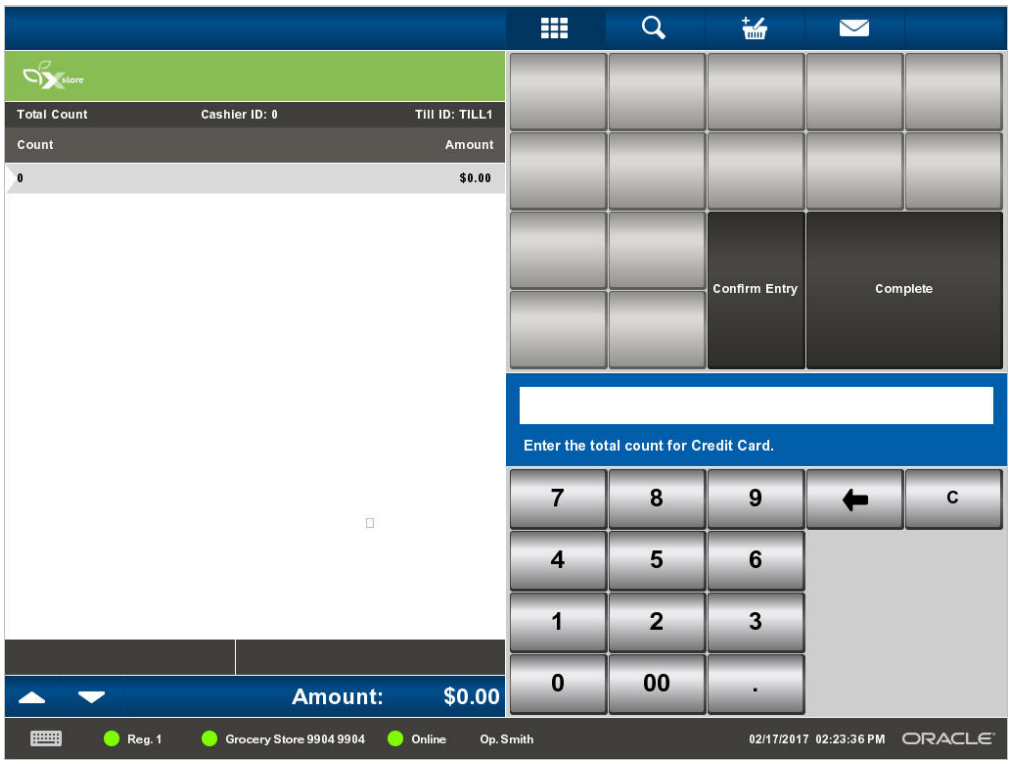
Figure 13–17 Till Audit - Denomination Count



- You are prompted to select a denomination and enter the quantity.
- Select a denomination. Enter the quantity and press **Confirm Entry**. The amount for the denomination and the total amount are displayed on the Sales Display Panel.
- Repeat this process for all available denominations.
- After you have entered all denominations for the tender type, press **Complete**. The system returns to the Count Summary.

b. If no denominations are configured, the Total Count screen appears.

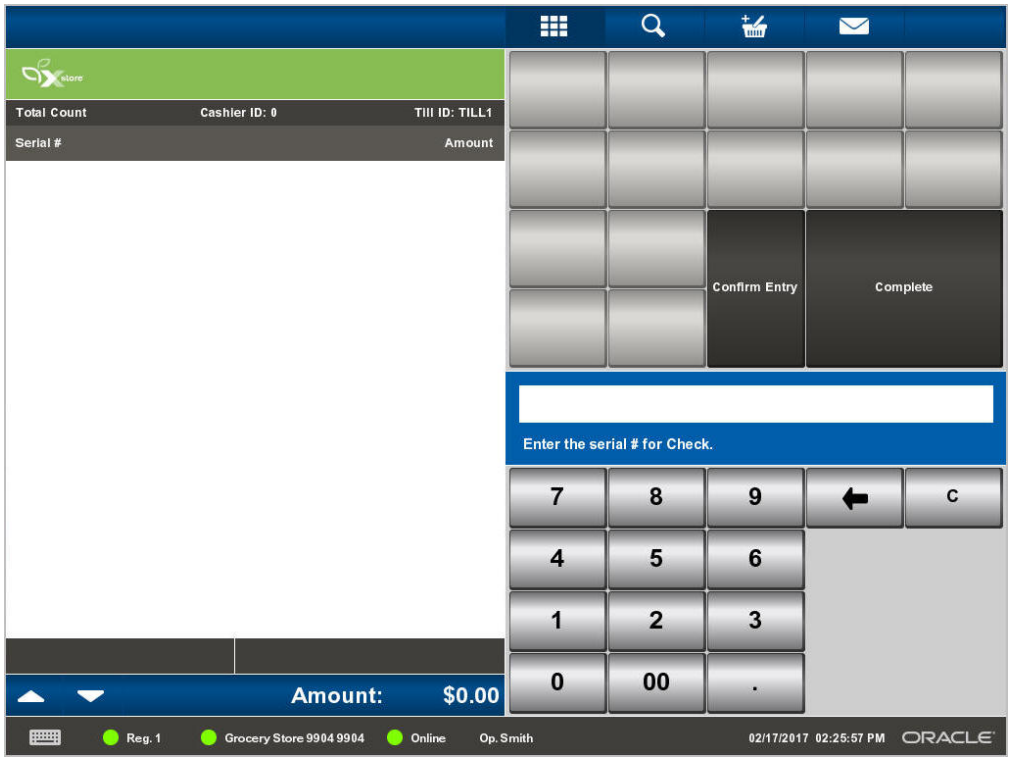
Figure 13–18 Till Audit - Total Count



- You are prompted to enter the total count for the selected tender type.
- Enter the total count and press **Confirm Entry**. The count is displayed on the Sales Display Panel.
- You are prompted for the total amount of the selected tender type.
- Enter the total amount and press **Confirm Amount**. The total amount is displayed on the Sales Display Panel.
- Then select **Complete**. The system returns to the Count Summary.

c. If the Check tender type is selected to count, the Total Count screen is displayed.

Figure 13–19 Till Audit - Tender Check



- You are prompted to enter the serial number for the tender type.
- Enter the serial number and press **Confirm Entry**.
- You are prompted for the amount of the selected tender type.
- Enter the amount and press **Confirm Amount**. The serial number and the entered amount are displayed on the Sales Display Panel.
- Then press **Complete**. The system returns to the Count Summary.

Note: Use the **Remove Count** button to remove an entered count from the Sales Display Panel.

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9. Depending whether or not your till is out of balance the displayed message varies.
   a. **Out of balance:** If tender types are out of balance, you are prompted to accept the difference.
      - **Yes** - accept the difference and close register.

        You are prompted for the reason. Select the reason and press **OK**.

        You can also add additional comments. Enter a comment and press **OK**.
      - **No** - repeat till count again.
   b. **In balance:** If all entered tender types are in balance, an Information prompt "Till is in balance" is shown. Press **OK** to close the Information prompt.
10. The register is opened, the Count receipt is printed.
11. The register is open. You can start your sales transactions.

Glossary

Cash Pickup

Cash Pickup is a cash drawer feature that allows an operator to take cash from a till so that the amount does not exceed a specified threshold amount. Each tender type that is physically in the till can be picked up, for example, foreign currencies, or coupons. The register shows a prompt, if the cash in the till is over the set maximal amount.

Deals

Deal pricing discounts are automatically applied to items that have been scanned. No user interaction is required to apply a deal to a transaction. Once the "trigger" items are added, the system applies the corresponding discount.

Discounts

Discounts can be applied to single line items, multiple line items, or entire transactions. Transaction-level discounts are applied in the same manner as a line item discount. A transaction discount is applied equally to each eligible item in the transaction, a line item discount is applied to a single item, and a group discount is applied to a group of selected items in a transaction. Discounts my be specified as either amounts (for example, $5.00 off) or percentages (for example, 10 % off) for both item and transaction discounts.

House Account

A House Account allows a customer to use an in-house account as a form of tender and to make payments to this account.

Paid In Transaction

A Paid In transaction allows you to move funds into a till from non-sale sources.

Paid Out Transaction

A Paid Out transaction moves funds out of a till for non-refund purposes.

Register Accountability

A till is assigned to a register and can be used by any operator that uses the register. The first associate who signs on to the register is responsible for opening the till. The associate is then required to count the drawer. This process assigns the drawer t o the current register.

Retail Period

The Retail Period is the period in which the retailer defines their store hours, for example, 12:00 am - 11:59 pm.

Retail Session

The Retail Session is the timeframe in which a register is open.

Till Accountability

A till is assigned to a specific operator. At the automatic store/register open, you have to enter the float amount. The assigned till can be attached to any register the operator may work on during the day.

Till Audit

At a till audit, the user counts the tenders in the till.